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MEETING OF THE

COMMUNITY, ECONOMIC & HUMAN DEVELOPMENT COMMITTEE

Thursday, June 5, 2014 10:00 a.m. – 12:00 p.m.

SCAG Main Office 818 W. 7th Street, 12th Floor Policy Committee Room B Los Angeles, CA 90017 (213) 236-1800

If members of the public wish to review the attachments or have any questions on any of the agenda items, please contact Lillian Harris-Neal at (213) 236-1858 or via email harris-neal@scag.ca.gov

Agendas & Minutes for the Community, Economic, and Human Development Committee are also available at: http://www.scag.ca.gov/committees/Pages/default.aspx

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COMMUNITY, ECONOMIC AND HUMAN DEVELOPMENT COMMITTEE AGENDA JUNE 5, 2014

The Community, Economic and Human Development (CEHD) Committee may consider and act upon any of the items listed on the agenda regardless of whether they are listed as Information or Action Items.

CALL TO ORDER & PLEDGE OF ALLEGIANCE

(Hon. Margaret E. Finlay, Chair)

<u>PUBLIC COMMENT PERIOD</u> – Members of the public desiring to speak on items on the agenda, or items not on the agenda, but within the purview of the Committee, must fill out and present a speaker's card to the Assistant prior to speaking. Comments will be limited to three (3) minutes. The Chair may limit the total time for all comments to twenty (20) minutes.

REVIEW AND PRIORITIZE AGENDA ITEMS

RHNA AND HOUSING ELEMENT REFORM SUBCOMMITTEE UPDATE

(Hon. Bill Jahn, Chair)

INFORMATION ITEMS	<u>Time</u>	Page No.
1. Transit-Oriented Development (TOD): Benefits, Challenges and Best Practices (Ping Chang, SCAG Staff) Attachment	30 mins.	1
2. <u>California Environmental Protection Agency (Cal/EPA)</u> <u>California Communities Environmental Health</u> <u>Screening (CalEnviroScreen Tool Draft Version 2.0)</u> (<i>Ping Chang, SCAG Staff</i>)	15 mins.	74
3. Program for 25th Annual SCAG/USC Demographic Workshop – June 9, 2014 (Simon Choi, SCAG Staff) Attachment	15 mins.	87
4. Progress of One-on-One Meetings with Local Jurisdictions to Provide Assistance for a Bottom-up Local Input Process (Kimberly Clark, SCAG Staff)	20 mins.	89

CONSENT CALENDAR

Approval Item

5. Minutes of the April 3, 2014 Meeting Attachment 91



COMMUNITY, ECONOMIC AND HUMAN DEVELOPMENT COMMITTEE AGENDA JUNE 5, 2014

Receive and File			Page No.
6. 2014 Regional Council and Policy Committees Meeting Schedule	Attachment		96
7. SCAG Sustainability Planning Grants Program – Monthly Update	Attachment		97

CHAIR'S REPORT

(Hon. Margaret E. Finlay, Chair)

STAFF REPORT

(Frank Wen, SCAG Staff)

FUTURE AGENDA ITEM(S)

ADJOURNMENT

There is no CEHD Committee meeting in July (dark).

The next CEHD meeting will be held on Thursday, August 7, 2014 at the SCAG Los Angeles Office.



REPORT

DATE: June 5, 2014

TO: Community, Economic & Human Development Committee (CEHD)

FROM: Ping Chang, Program Manager; chang@scag.ca.gov; (213) 236-1839

SUBJECT: Transit-Oriented Development (TOD): Benefits, Challenges and Best Practices

EXECUTIVE DIRECTOR'S APPROVAL:

RECOMMENDED ACTION:

For Information Only - No Action Required.

EXECUTIVE SUMMARY:

As part of the efforts to support the implementation of the 2012-2035 RTP/SCS, staff has been conducting research related to transit-oriented development (TOD) and prepared the draft paper as attached. The objectives of the paper are to develop a framework and assemble information to support the implementation of TODs in the region. The paper focuses on the benefits, challenge, and best practices for TODs. It was developed based on literature review, expert interviews and two case studies of TODs in the region. Staff has been briefing local partners and will continue the outreach process. At the meeting, staff will brief the committee on the draft paper for discussion and comments.

STRATEGIC PLAN:

This item supports the Strategic Plan, particularly Goal 1: Improve Regional Decision Making by Providing Leadership and Consensus Building on Key Plans and Policies.

BACKGROUND:

Transit-oriented developments (TODs) are generally considered to be moderate- to high-density mixed-use developments located within walking distance (i.e. one-half mile) from a major transit stop, which includes all rail stations (both Metro-rail and Metrolink) and select bus stops with high quality bus service (i.e., 15 minutes or less during peak periods). TODs have become an important part of the overall planning strategies in Southern California; in SCAG's 2012-2035 RTP/SCS, about half of the future growth in housing and employment was planned in High Quality Transit Areas (HQTAs). HQTAs are areas within one-half mile of major transit stops (TODs) and areas within one-half mile of high quality bus corridors connecting TODs. The map (on page 3 of Attachment 2) shows the HQTAs and rail lines/stations (Metrorail and Metrolink) in the SCAG region.

Focusing growth in HQTAs is a core regional strategy (HQTA strategy) which encompasses areas in five of the six counties in the region. About 35% of the total transportation investment of the 2012 RTP/SCS is for transit that is located within the HQTAs. Though HQTAs include about half of the future growth, areas outside HQTAs can also share in the same goals and benefits as TODs and contribute to the overall sustainability goals of the region. This additional development can be in the form of mixed-use development, infill development, or concentrated destinations each of which is a common feature of TODs. Hence, some of the TOD best practices may be applicable for development outside the HQTAs.



REPORT

Given the first light rail line in the SCAG region opened less than a quarter century ago in 1990, TOD is still a relatively new concept in Southern California. The objective of this paper is to provide informational support for HQTA strategy implementation in the region. Specifically, it includes a summary of key knowledge and information supportive of TOD implementation for a wide range of partners and stakeholders, including local elected officials and planning staff.

The paper focuses on three key dimensions of TODs: benefits, challenges, and best practices for success. Key findings of the paper include the following:

- TODs can generate a broad range of benefits to individuals and communities in the areas of transportation, the economy, and the environment.
- Major challenges for developing TODs include higher risks and cost for developers and difficulty to obtain private financing, compared to traditional single-use development.
- Key factors for successful TODs include such things as favorable market conditions and supportive local policies including density and financial incentives.

The paper also highlights a variety of best practices in the areas of TOD financing; land use regulation; equitable TODs; parking management; design and development guidelines and standards; natural resources management and conservation; environmental review and entitlement; innovative partnership; engagement; and public education.

Finally, the paper suggests potential next steps to continue supporting the implementation of TODs and the HQTA strategy.

FISCAL IMPACT: Staff activities related to the TOD studies are included in FY 2013-14 Overall Work Program under 080.SCG153.04.

ATTACHMENTS:

- 1. PowerPoint Presentation: "Transit-Oriented Development: Benefits, Challenges and Best Practices"
- 2. Draft Staff Paper Titled "Transit Oriented Developments in Southern California: Benefits, Challenges, and Best Practices for Success"





CEHD Policy Committee

Transit-Oriented Development: Benefits, Challenges and Best Practices

Ping Chang, Program Manager Land Use and Environmental Planning

June 5, 2014

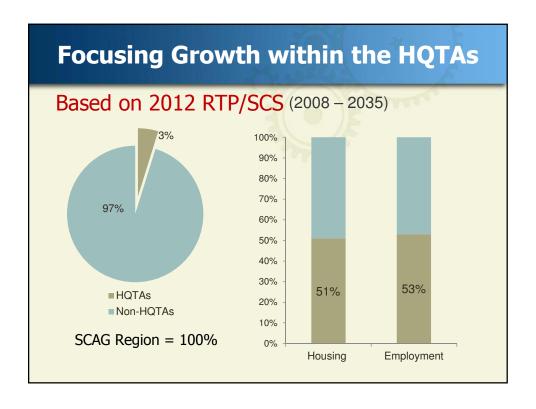
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What are TODs?

- > Development within walking distance (1/2 mile) from a major transit stop
 - ✓ Rail stations (Metrorail & Metrolink)
 - ✓ Select bus stops with high quality bus service (15 minutes or less during peak periods)
- > Generally moderate- to high density mixeduse development

Why TODs are important? In the 2012-2035 RTP/SCS, about half of the future growth (e.g., households & employment) was planned in High Quality Transit Areas (HQTAs)





Overall Considerations

- > HQTA strategy: a regional strategy
 - ✓ Includes 5 counties & multiple transit modes (Metro-rail, Metrolink & bus)
- Areas outside HQTAs: also need sustainable development
- ➤ TOD best practices may be applicable to development outside HQTAs
- ➤ TOD implementation: needs to be in the context of transit corridors/HQTAs

Staff TOD Paper

- Objectives
 - ✓ Provide a framework and information to support HQTA strategy implementation
 - ✓ One step in the process
- > Approach
 - ✓ Conduct literature review
 - ✓ Conduct case studies
 - ✓ Interview TOD experts

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Benefits of TODs

- Increase transit use, active transportation
- Reduce per capita
 VMT and associated
 GHG emissions





Benefits of TODs (cont'd)

- Quality of life benefits
 - access to transit, reduced household transportation expenditures
- Command higher premiums (e.g., rent, property value)
- Show signs of greater resilience to economic downturns
- Other co-benefits (e.g., reduced per capita water & energy consumption)

Challenges to Develop TODs

- > Higher risks and costs for developers
 - ✓ Land assembly
 - ✓ Entitlement
- > Greater difficulty to obtain private financing
 - ✓ Particularly for mixed-use development

Challenges to Develop TODs (cont'd)

- Local zoning may not be supportive of TODs
- > Local community concerns
 - ✓ Density
 - ✓ Traffic

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Factors for Successful TODs

- Favorable real estate market conditions
- Supportive polices and best practices





General

- > Emerged over the past couple decades
- Address various aspects of TOD
- ➤ Aimed to improve the TOD performance in: functionality, quality of place/environment
- ➤ No silver bullet: need to find the most appropriate combinations
- > Transit corridor approach needed

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Highlights of TOD Best Practices

Land Use Planning & Regulation

- Specific plans, neighborhood plans, transit areas plans
- > TOD friendly zoning; e.g., overlay zoning

Financing – TOD Development

- > Tax increment financing
- > Location efficient mortgage
- > Impact fee reductions/waiver

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Highlights of TOD Best Practices

Financing - TOD Infrastructure

- Direct fees
- > Debt
- > Credit assistance
- > Equity
- > Value capture
- > Grants

Equitable TODs

- Creating affordable housing
 - √ density bonus (Gold Line Del Mar Station)
 - ✓ Transit-oriented affordable housing funds (Bay Area)
- > Preserving affordable housing
 - ✓ Deed restrictions
 - ✓ Low income housing tax credits
 - ✓ Rehabilitation assistance

1

Highlights of TOD Best Practices

Development and Design Guidelines

- > Structure design features
- Complete street policies (e.g., Rancho Cucamonga, Hermosa Beach, Huntington Park, Baldwin Park, Ojai & Azusa)
 - ✓ First/last miles
- Livable communities

Environmental Review and Entitlement

- > State streamlining policies
 - ✓ SB 375, SB 226, SB 743 on infill, mixed-use development
 - ✓ AB 417 for bike lane projects
- > Local streamlining policies

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Potential Next Steps

- Continue outreach to local jurisdictions
- Investigate tools to estimate/monitor TOD benefits at project level
- Explore TOD opportunities for high quality bus corridors

For Additional Information

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Lijin Sun

sunl@scag.ca.gov, 213-236-1882





Transit Oriented Developments in Southern California: Benefits, Challenges, and Best Practices for Success

Prepared by SCAG Staff, Draft, May 2014

Executive Summary

Transit-oriented developments (TODs) are generally mixed-use developments located within walking distance (i.e. one-half mile) from a major transit stop, which includes all rail stations (both Metro-rail and Metrolink) and select bus stops with high quality bus service (i.e., 15 minutes or less during peak periods). TODs have become an important part of the overall planning strategies in Southern California; in SCAG's 2012-2035 RTP/SCS, about half of the future growth in housing and employment was planned in High Quality Transit Areas (HQTAs). HQTAs are areas within one-half mile of major transit stops (TODs) and areas within one-half mile of high quality bus corridors connecting TODs. The map on page 3 shows the HQTAs and rail lines/stations (Metro-rail and Metrolink) in the SCAG region.

Focusing growth in HQTAs is a core regional strategy (HQTA strategy) which encompasses areas in five of the six counties in the region. About 35% of the total transportation investment of the 2012 RTP/SCS is for transit that is located within the HQTAs. Though HQTAs include about half of the future growth, areas outside HQTAs can also share in the same goals and benefits as TODs and contribute to the overall sustainability goals of the region. This additional development can be in the form of mixed-use development, infill development, or concentrated destinations each of which is a common feature of TODs. Hence, some of the TOD best practices may be applicable for development outside the HQTAs.

Given the first light rail line in the SCAG region opened less than a quarter century ago in 1990, TOD is still a relatively new concept in Southern California. The objective of this paper is to provide informational support for HQTA strategy implementation in the region. Specifically, it includes a summary of key knowledge and information supportive of TOD implementation for a wide range of partners and stakeholders, including local elected officials and planning staff.

The paper focuses on three key dimensions of TODs: benefits, challenges, and best practices for success. Key findings of the paper include the following:

- TODs can generate a broad range of benefits to individuals and communities in the areas of transportation, the economy, and the environment.
- Major challenges for developing TODs include higher risks and cost for developers and difficulty to obtain private financing, compared to traditional single-use development.

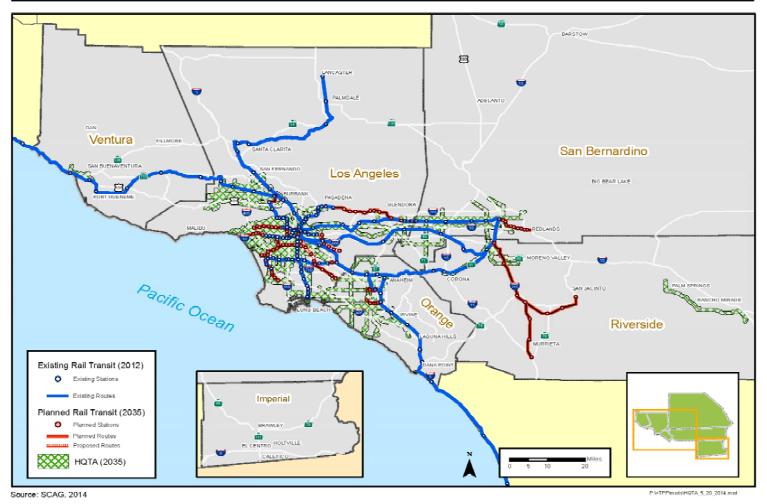
• Key factors for successful TODs include such things as favorable market conditions and supportive local policies including density and financial incentives.

The paper also highlights a variety of best practices in the areas of TOD financing; land use regulation; equitable TODs; parking management; design and development guidelines and standards; natural resources management and conservation; environmental review and entitlement; innovative partnership; engagement; and public education.

Finally, the paper suggests potential next steps to continue supporting the implementation of TODs and the HQTA strategy.



SCAG Regional Rail Transit System and High Quality Transit Areas (HQTA): 2035



*Please note that this map is still in draft form and may undergo changes as SCAG continues to update its transportation network.

Introduction

Transit-oriented developments (TODs) are generally mixed-use developments located within walking distance (e.g., half a mile) from a major transit stop. TODs are an important component of the regional Sustainable Communities Strategy (SCS) to preserve its long-term livability and sustainability.

Given the increasing emphasis on TODs, policy makers and the planning communities are naturally interested in the questions on whether and how to promote TODs particularly in specific areas. While TOD implementation within an identified area requires a more focused study to tailor to the uniqueness of the study area, this paper provides a framework to consider implementation of TODs in Southern California. It assembles information on key dimensions of TODs: their benefits to communities and individuals, challenges to develop TODs, and factors for success of TODs in Southern California.

This paper utilizes various sources of information including literature review, interviews with two TOD experts, case studies on two existing and two potential TODs, and related analysis conducted by SCAG staff. All literature reviewed has been included in the Bibliography in Attachment 8. While TODs may be based on various types of transit modes (e.g., urban rail, commuter rail, and bus), the existing literature concentrates more on intra-urban rail-based (such as Metro-rail) TODs. The case studies of existing TODs include two joint development projects at Wilshire/Vermont (Red Line) and at Del Mar (Gold Line) both of which were completed in 2007.

It should be noted that the paper is organized in a way that readers can easily target their specific interests. Specifically, after the brief overview, the paper includes seven attachments (listed below) that contain more detailed information on specific aspects of TOD implementation.

What are the TOD benefits?

TOD benefits may include the following:

- Increase transit use: TOD residents generally have higher rates of transit use than residents outside the TODs. For example, for both the Wilshire/Vermont and Del Mar TOD project areas, the share of transit to work increased by four to nine percentage points between 2000 and 2009 (see Attachment 5).
- Help to reduce per capita vehicle miles traveled (VMT) and associated greenhouse (GHG) emissions:
 - For example, compared to non-TODs, TODs (with ¼ mile radius) along Red Line and Gold Line would reduce the VMT per capita per day by 44%, from 12 to 6.7 vehicle miles. It would also reduce the per capita CO2 by a similar level.
- Command higher premiums both in sales prices and rents
- More resilient to economic downturns and contribute to stabilizing the communities
- Generate other co-benefits such as reduced land consumption and other resource consumption (e.g., energy and water) on a per capita basis due to the more compact development pattern
- Command higher return of investment for successful TODs
 - Successful TODs would command two to five percentage points higher internal rate of investment than typical residential investment (Please see Attachment 4 which includes an Overview of Financial Considerations for TODs based on Literature Review).

TOD benefits may change over time. For example, as the rail transit network is further expanded and as more jobs are placed closer to rail transit stations, higher percentages of the residents within the TOD may choose transit. This is particularly relevant in the SCAG region as the transit system is undergoing significant expansion in the next two decades.

Attachment 1 includes additional information about TOD benefits.

It should also be noted that while TODs are important, they are not the only solution for sustainable development. Infill development, mixed-used development, and complete communities are a few other examples.

What are the challenges for TODs?

TOD developments face major challenges which, if not overcome, may limit their wider implementation in the region:

- Higher risk and cost for developers
 - Cost and uncertainties in land acquisition;

- Cost, uncertainties and risk in the entitlement and environmental clearance processes;
- Need for financial assistance with pre-development capitals;
- Additional remediation costs;
- Challenging financially for including affordable housing.
- Greater difficulty to obtain private financing
 - Lenders typically have concerns about financing mixed-use projects or those with lower parking ratios (which are typical in TODs); and
 - Loss of the redevelopment funding including the associated public subsidy for affordable housing.
- Local zoning not TOD ready
- Local community concerns
 - Density
 - Traffic
 - Pedestrian/bicyclist injuries and fatalities

Please see Attachment 2 for further information on the challenges to develop TODs.

What are the key factors for successful TODs?

In addition to resolving the challenges discussed above, successful TODs require favorable market conditions, a supportive policy environment, and experienced development teams. With a favorable market condition, a supportive policy environment would enhance the prospects of TOD success. Attachment 3 contains additional information about factors of successful TODs.

Supportive Local Policies and Best Practices

Policies and best practices supportive of TOD may make it feasible by creating a TOD-friendly environment. Local communities have developed and implemented policies and practices to overcome challenges that have been observed to limit TODs over the last decade. They include, for instance, offering financial incentives; tailoring land use regulations; creating equitable TOD through density bonus; managing parking; adopting detailed and high-quality design and development guidelines and standards; managing and conserving natural resources in TOD; streamlining environmental review and entitlement; forming partnership; TOD governance; establishing TOD through marketing; and community engagement and support through education.

Designing a set of solutions to meet TOD challenges that will work for a community requires a deep understanding of what makes TOD work and what does not make TOD work in that particular community. Since TOD-supportive polices and best practices vary from one community to another, local policies and practices discussed here are merely examples of possible solutions that may have different effects in a different situation with different players involved for a different community at a different time. In addition, each policy and practice may have its unique spatial effects depending on

the scale of its application. Hence, continuous monitoring and assessment on the performance of TOD tools implemented over time is necessary.

Please see Attachment 6 for further information on the supportive local policies and best practices.

In the SCAG region, there has been an uneven distribution of TOD development. Specifically, there are much more TOD activities along Red Line and Gold Line than along Blue Line and Green Line. The significant disparity in TOD development between the Blue Line and Gold Line can serve as an example to illustrate the key factors for successful TODs. Since the Blue Line opened in 1990, 13 years earlier than the Gold Line, it has triggered few TOD projects. In contrast, since 2003, the Gold Line has attracted significant development activities around some of its stations. Factors contributed to this disparity in TOD activities include the following:

- More favorable market conditions for Gold Line than Blue Line
 - e.g., higher levels of poverty and unemployment for station adjacent areas for the Blue Line than the Gold Line
 - o an abundance of contaminated sites along the Blue Line Corridor
- More supportive local policies and best practices for Gold Line than Blue Line
 - o general lack of pre-planning for TODs in anticipation of the Blue line, including:
 - land use and zoning incompatible for TODs
 - missed opportunities for land acquisition and joint development opportunities
 - o performed pre-planning for TODs in anticipation of the Gold Line
 - developed specific plans to ensure compatible land use/zoning for TOD projects
 - developed various incentives for TODs including financial, density, and reduced parking requirements
 - utilized joint development opportunities

Next Steps

Potential next steps may include the following to further support the implementation of HQTA strategy including TODs:

- Continue to engage staff of the local jurisdictions for further input with respect, for example, the challenges and barriers to TOD implementation.
- Investigate and consult with experts regarding TOD opportunities for high quality bus corridors.
- Investigate easy-to-use tools to estimate the benefits of TODs at the project level.

ATTACHMENT 1 - Summary of TOD Benefits

ATTACHMENT 2 - Summary of Challenges to Develop TODs

ATTACHMENT 3 - Summary of Factors for TOD Success

ATTACHMENT 4 - Overview of Financial Considerations for TODs

ATTACHMENT 5 - Summary Information of Two Existing TOD Case Studies

ATTACHMENT 6 - Supportive Local Policies and Best Practices

ATTACHMENT 7 - Bibliography



Summary of TOD Benefits

There are primary and co-benefits from TODs. Primary benefits are direct benefits while co-benefits largely spin off from primary ones. This summary of TOD benefits is developed through the review of literature included in Attachment 7 - Bibliography.

What Are the Primary Benefits from TODs?

Public Benefits

- Can increase transit use and provide increased transportation choices
 - TOD residents generally have higher rates of transit use than residents outside the TODs.
 TOD residents in California are about five times more likely to commute by transit as the average resident worker in the same city.¹
 - TOD office workers in California are more than 3.5 times as likely to commute by transit as the average worker in the same region.²
 - Areas with more mature rail system and smart growth initiatives would support higher levels of transit use among TOD residents.
 - TOD residents are more likely to use transit if there is less of a time benefit traveling via car.
 - TOD provides important mobility options for young people, the elderly, people who prefer not to drive, and those who don't own cars.
- Help to reduce vehicle miles traveled (VMT) and associated greenhouse (GHG) emissions:
 - For example, compared to non-TODs, TODs (with ¼ mile radius) along Red Line and Gold Line reduced the VMT per capita per day by 44%, from 12 to 6.7 vehicle miles. It would also reduce the per capita CO2 by a similar level.
- Increase opportunities for active transportation
 - For example, for both the Wilshire/Vermont and Del Mar TOD project areas, the share of active transportation (walking or biking) to work increased by one to two percentage points between 2000 and 2009 (see Attachment 5).
- Can provide joint development opportunities

¹ Lund, Hollie; Cervero, Robert; & Willson, Richard: 'Travel Characteristics of Transit-Oriented Development in California', January 2004.

² Ibid.

- TOD can provide joint development opportunities for transit operators through enhanced revenue generation capacity (e.g., air rights or ground lease) and cost reduction opportunities (e.g., cost sharing of parking).
- Joint development on Metro's land is the most common form of TOD in Los Angeles County, primarily because of the limited amount of readily developable land around transit stations.
- Revitalized Neighborhoods and Economic Development
 - TOD can be a catalyst for redevelopment and revitalization.
 - TOD can attract new investment and businesses
 - Examples include the following:
 - Red Line Hollywood/Vine, Hollywood/Highland and Vermont/Western Stations
 - Gold Line Del Mar Station
- Reduced Combined Housing and Transportation Costs
 - TOD provides an opportunity to reduce combined housing and transportation costs mainly because of its higher density and location efficiency for TOD residents and workers.
 - Studies show that households living in TODs can use fewer automobiles.

Private Sector Benefits

- Higher Property Value
 - TOD's synergy of proximity, density, mixed use and pedestrian orientation can, under the right conditions, result in gains in property value and overall real-estate market performance.
 - Studies over the past two decades show that average housing premiums associated with being near a transit station have ranged from 6.4% in Philadelphia, 6.7% in Boston, 10.6% in Portland, 17% in San Diego, 20% in Chicago and 24% in Dallas.

What Are the Co-Benefits from TODs?

Public Benefits

- Less traffic congestion and improved air quality at the regional level
- Increased local property and sales tax revenues
 - o For example, it is estimated that both the Wilshire/Vermont and Del Mar TODs generated an annual property tax of approximately \$1.3 million each.
- Reduced sprawl and conservation of open space
- Reduced energy consumption (on a per capita basis)
- Reduced transportation and other infrastructure costs
- Increased physical activity through active transportation with associated health benefits

Private Sector Benefits

- Increased retail sales
- Increased access to labor pool



Summary of Challenges to Develop TODs

- There is generally a lack of assembled lots adequate for development.
 (Joint development with Metro has become almost a necessary condition for successful TOD projects currently completed, under construction or consideration.)
- 2. For rail transit stations located in the median of or adjacent to freeways, it is more difficult to locate development close to transit stations (and hence also the freeways) than otherwise due to potential impacts from, for example, near roadway air pollution.
- 3. Finance mechanisms are particularly difficult to arrange and to align with the project timeline, causing further delay since additional "expectations" are present, such as affordable housing for TOD projects on land owned by Metro.
- 4. Finance at the pre-development stage of the TOD projects has been identified as a major challenge. The cost of the capital needed to address entitlement can run as high as requiring 15-20% rate of return, due to the uncertainty particularly at the beginning of the TOD process, compared with 7-8% for construction loan from banks, and 4-5% long-term returns once the projects are completed.
- 5. Permitting and environmental review processes, as well as parking requirements may pose additional uncertainty for and increase the costs of the TOD projects.
- 6. Parking has been identified as a potential source of cost reduction, however, communities are apprehensive about reduced parking due to concerns of "spillover" into adjacent residential areas as well as concerns to meet local business needs.
- 7. The cost of supporting infrastructure for TODs could be a challenge. They may include, for example, sewer and water capacity expansion and sidewalk improvements.
- 8. Bicyclist and pedestrian safety around the TOD projects areas may be a concern but can be addressed through complete street strategies.
- 9. Other community concerns of TOD development may include localized traffic impacts and potential impacts of gentrification and displacement.

Summary of Factors for TOD Success (Based on Case Studies)

Two TOD projects within the Los Angeles County were examined in-depth. They are the Del Mar Station (Gold Line) TOD project in the City of Pasadena and the Vermont/Wilshire Station (Red Line) TOD project in the City of Los Angeles. Since completion, both projects have demonstrated stellar performances and are being studied closely by developers, planners, and policy-makers. After an initial data analysis of topology in and around the station areas, SCAG staff identified the following six factors that set these two TOD projects apart from the rest TOD projects.

- 1. Strength of the Overall Economy and Real Estate Market
 - a. Both TOD projects were completed before the economic recession in 2008;
- 2. Capability of the selected developer
 - a. Both TOD projects were planned and built by a capable developer with a track record of quality who possesses the vision, experience, financial strength, and willingness to navigate through many political, community, financial, and technical hurdles of developing a complex TOD project on top of the transit station;
- 3. Ease of Land Assembly
 - a. Both TOD projects were in a joint public-and-private partnership with Metro on Metro-owned lands at the transit stations;
- 4. Location
 - Just like any other real estate development, location plays a key role in the overall success rate of a TOD project. Both TOD projects are close to other modes of transportation in vibrant neighborhoods;
- 5. Design and Management during the operation of both TODs; and
- 6. Community/Neighborhood Outreach, and Acceptance of TOD projects

Overview of Financial Considerations for TODs (Based on Literature Review)

Market Conditions Analysis

Market conditions analysis is needed in determining the financial feasibility of the TODs. It includes primarily the following tasks:

- Conduct a regional market analysis
 - A regional overview of demographics and employment growth trends that may influence the local market area in which a TOD is located
 - Common analysis factors include, population, age, income, expected job growth, and fastest growing job sectors
- Conduct a local market analysis of supply and demand
 - An overview of factors in a competitive market area that may influence the financial performance of a TOD during its operation
 - Identify the sphere of market influence (i.e. a three-mile market radius in an urbanized area)
 - Two types of local market analysis are conducted (i.e. Residential Market Analysis and Retail Market Analysis)
 - Common factors that may influence the market for residential and retail units may include occupancy rate, vacancy rate, rent growth, market rental rates, and retail sale activity
- Conduct a market capture analysis
 - A study of market capture rates for both residential and retail units in order to ensure an economically viable TOD

Common Sources of Costs and Revenues (Illustrative)

Sources of TOD Development Costs

TOD development costs include both hard and soft costs. Hard costs are direct construction costs for acquiring tangible assets and materials that are needed to complete the construction. In contrast, soft costs include, for example, professional services fees (i.e. engineering, financing, and legal fees) that are required to design, develop, and build a TOD. Additionally, capitals are required to assemble suitable lands for a TOD³ through either land acquisition or lease.

³ A public-and-private partnership (PPP's) to jointly develop a TOD may improve the ease of land assembly, thereby reducing land cost (see Attachment 3).

Sources of TOD Operational Revenues

Main sources of TOD operational revenues include incomes from selling or leasing residential apartments and commercial or retail spaces. If a TOD includes public parking that is metered, parking may be another source of income during the operation of a TOD.

Common Indicators of Financial Performance (Illustrative)

A set of indicators are used to evaluate a TOD's financial performance. These indicators calculate economic returns to determine whether a TOD's returns justify its perceived risks. This exercise is called financial feasibility analysis, and it is used to demonstrate a TOD's financial capacity to meet the minimum thresholds desired by investors.

Common indicators of financial performance for a TOD include the following:

- Internal rate of return (IRR)
 - IRR is a measurement used in capital budgeting to measure the profitability of an investment. The higher the IRR, the more profitable the investment will be.
 - IRR varies depends on the type of real estate projects.
 - Two types of IRR are considered.
 - Unleveraged IRR. It measures the required return on an investment when the investment is financed entirely by equity with no debt.
 - Leveraged IRR. It measures the required return on an investment when the investment is financed partially by debt, and this coupling of equity with debt increases the return on invested equity. Hence, leveraged IRR is a more accurate and realistic measure of expected return.
- Rate of return on equity investment (ROE)
 - ROE is the amount of net operating income (NOI) returned as a percentage of an investor's equity. Therefore, it measures a TOD's profitability by revealing how much profit the TOD generates with the money an investor has invested.
- Rate of return on total development cost
 - Rate of return on total development cost is also called rate of return on investment (ROI), which measures the efficiency of a TOD investment. To calculate ROI, the net gains from the development are divided by the total development cost.
- Net operating income (NOI)
 - NOI, which is defined as a TOD's operating income after operating expenses are deducted, is viewed as a good measure of a TOD's financial performance.
 - NOI is escalated each year for a number of years (e.g., an annual 3-percent escalation for 10 years).
- Gross margin

- Expressed in a percentage, gross margin reveals how much a TOD earns after taking into consideration of the development costs that it incurs.
- It divides NOI by gross operating revenue. The higher the percentage, the more a TOD retains as gross profit on each dollar of revenue generated.
- Capitalization rate ("cap rate")
 - Cap rate is a rate of return on a real estate investment based on the expected income
 that the property will generate. It divides the income that a property will generate by the
 total value of the property.



ATTACHMENT 5

Summary Information of Two Existing TOD Case Studies: Wilshire/Vermont and Del Mar TODs



Transit Oriented Development (TOD) Projects Analysis Framework				Surrounding TOD Development (Not on Metro-Owned Lots				
	Del Mar Station (Gold Line)*	Wilshire/Vermont Station			217 S. Marengo/238 S Arroyo Pkwa	The Vermont: 3150 Wilshire Blvd		
Overall Process (60-85 Months)	Entitlement: (1-18 Mon Months	ths), Construction: 24-36						
Planning (Metro Issues RFP)	Pre 2000	2001	A					
Start	2001	2004		2010	2007	2013		
Completion	2007	2007		2011	2008	Under construction		
Architect	Moule & Polyzoides Urbanists	Arquitectonica				The Jerde Partnership		
	Nadel Architects	ah'be'				Harley Ellis Devereaux Corporation		
	Melendrez			Unknown	Unknown			
Construction	Keller Builders Taisei Construction	Taisei Construction						
	Taiser Construction							
Developer/Finance	Urban Partners, LLC	Urban Partners				J H Snyder		
	Oaktree Capital Management California National	Real Estate Capital Partners Polis Development				Washington Capital Management MEPT		
	Bank Archstone Smith	California Urban		Unknown	Unknown	Bentall Kennedy		
	METRO	Partners (CalPERS)				J.P. Morgan		
	Construction Authority	Bank of America				US Dept Housing & Urban Devp		
						LAC Redevelopment Agency		

Transit Oriented Develop	ment (TOD) Projects Ana	lysis Framework		Surrounding	TOD Development (Not o	on Metro-Owned Lots)	
Finance arrangement	Private investment with city assistance* (Need verify)	Project financing was arranged through MacFarlane Partners (on behalf of CalPERS), Bank of America and a \$135 million tax-exempt "low-floater" affordable housing bond issue which, at the time, was the largest in California history.		Private Funding Private Funding		HUD: \$12.5 million loan LACRA: \$17.5 Million Private Funding (see above)	
Projection description	Del Mar Station (Gold Line)*	Wilshire/Vermont Station		155 Cordova Pasadena	217 S. Marengo/238 S Arroyo Pkwa	The Vermont: 3150 Wilshire Blvd	
Joint Development	with Metro (Matro's Land)	with Metro (Metro's Land)		n.a.	n.a.	n.a.	
Project costs (\$million)*	77	136		Luxury Condos for sale+	Moderate condos for sale++	150	
Land (Acre)	3.4	3.24)	0.4	1.12	2.13	
Housing Units	347	449		29	97	464 (Luxury Apt.)+++	
Market rates	326	359		29	97	464	
Affordable Units	21	90		0	0	96 (In near-by neighborhood)	
Density (units/acre)	102	139		77	87	,	
Retail/Commercial (sf)	11,000	36,486		n.a.	6,730	40,000	
Parking	1,190	668		tbd	tbd	910	
Transit parking	600	n.a.		n.a.	n.a.	n.a.	

Transit Oriented Develo	opment (TOD) Projects Ana	alysis Framework		Surrounding TOD Development (Not on Metro-Owned Lots)			
	Del Mar Station (Gold Line)*	Wilshire/Vermont Station		155 Cordova Pasadena	217 S. Marengo/238 S Arroyo Pkwa	The Vermont: 3150 Wilshire Blvd	
Topology of the Project Area (1/4 mile)							
Population							
2000	1,453	4,824					
2010	2,215	5,205					
Growth, %	52%	8%					
Household							
2000	837	1,930					
2010	1,301	2,391					
Growth, %	55%	24%					
Housing Units							
2000	903	1,977					
2010	1,432	2,587	70				
Growth, %	59%	31%					
Household Size							
2000	1.74	2.50					
2010	1.70	2.18					
Change (implications)**	-0.03	-0.32					
Median Household Income (\$2009)							
2000	\$48,879	\$23,361					
2009	\$60,279	\$28,943					
Change % (implications)	23.3%	23.9%					
% of 0 or 1 Vehicle Household							
2000	76%	87%					
2009	69%	82%					
Change (implications)	-7%	-5%					

Transit Oriented Develo	oment (TOD) Projects Ana	lysis Framework	Surrounding To	OD Development (Not	on Metro-Owned Lots)
Jobs					
2002	3,045	2,827			
2007	3,288	3,402			
Growth, %	8%	20%			
Workers					
2000	642	2,438			
2009	871	3,720			
Growth, %	36%	53%			
H + T Costs (in 2000, \$2009)	\$20,632	\$6,742			
% of AMI	42%	28.9%			
Housing Costs	\$12,489	\$3,621			
% of AMI	26%	16%			
Transportation Costs	\$8,148	\$3,119			
% of AMI	17%	13%			
H + T Costs (in 2009, \$2009)	\$34,377	\$9,690			
% of AMI	57%	33%			
Housing Costs	\$22,870	\$5,470			
% of AMI	38%	19%			
Transportation Costs	\$11,507	\$4,220			
% of AMI	19%	15%			
Mode of Transportation (2000)					
Public Transportation	6%	38%			
Walk or Bike	6%	5%			
Others	88%	57%			

Transit Oriented Develop	oment (TOD) Projects Ana	lysis Framework		Surrounding TOD Development (Not on Metro-Owned Lots)
Mode of Transportation (2009)				
Public Transportation	10%	47%		
Walk or Bike	8%	6%		
Others	82%	48%	A	
CEQA/Environmental Review	Mitigated Negative Declaration (and license agreement) approved by City Council for temporary relocation of the historic transit depot building in July 2001. Variances approved on December 19, 2001 with certification of EIR. Final Design Review approved on June 10, 2002. Final Arts Plan approved on August 13, 2003.	1. EIR completed in 1995 for high-rise office development 2. Wilshire Vermont leveraged existing EIR to expedite project approvals 3. LACRA acted as lead agency		
Economic Impact (Annual, on				
site)	2.20	10.05)	
Total retail sales (\$Million)	3.30	10.95		
Retail jobs	12	38		
Rental income (\$Million)	11.14	13.47		
Local sales taxes, to city	\$24,750	\$82,094		
Property Taxes (1%, \$Million)	1.34	1.36		
Transportation Impacts (Annual)				
VMT Savings vs. non-TOD	640,562	828,854		
Total jobs accessibility (% Change)	27%	100%		

Transit Oriented Develop	ment (TOD) Projects Ana		Surrounding	TOD Development (Not o	on Metro-Owned Lots)	
Auto accessibility (%	39%	94%				
Change)						
Transit Accessibility (%	44%	86%				
Change)			A			
Active transportation trips	37,134	109,655				
(Walk + Bike)						
Transit trips	34,639	355,803				
Co-Benefits (Annual)						
CO₂reduction (mt)	272	352				
Pedestrian/Bike	See attached	See attached analysis				
accidents/injuries	analysis					
Energy (tbd)						
Water (tbd)						

NOTES:

- + Sale prices \$350,000 (600 sf) to \$715,000 (1,600 sf)
- ++Sale prices \$850,000 (1,900 sf), 1.35 million (2,250 sf), 2.45 million (3,840 sf)
- +++ Luxury Apt, with rents over \$3,000/month
- * The development was sold in December 2004 for \$134 million to Archstone-Smith, a real estate investment trust, after receiving an unsolicited offer
- ** Implications: Consistent with demographic trends

TOD Challenges:

- 1. Available lots in TOD District or TOC
- 2. High costs and high risk/uncertainties associated with entitlement process
- 3. Assistance in pre-development costs
- 4. Affordable housing requirements need sizable subsidies, thereby making them significant challenges without RDA
- 5. Many transit routes are not suitable for TOD projects

- 6. Joint development and PPP with the Metro are the ready development lots is always the plus
- 7. Commercial real estate loan guarantees" as an additional TOD challenge
- 8. Regional planning efforts should focus on monitoring TOD performance
- 9. Planning efforts should also look into Non-urban rail related TOD analysis and site identification
- 10. Given the constraints on available lots and location/market consideration, should study the TOD development in North Hollywood area and develop the strategic regional TOD development policy around following principles:
 - a) Identify regional TOD development centers/clusters
 - b) Compile guidebook for TOD development, starting with lots assembly and identification, in particular lots between 1/3 (?) to 1/2 acres?
 - c) Collaborate with local jurisdictions to streamline entitlement process, reduce uncertainties and high risk/costs associated with the process
 - d) Complete street and near-by infrastructure investment and funding

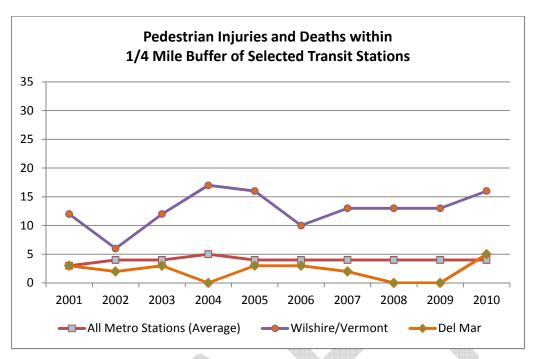
Pedestrian/Bicycle Accidents/Injuries Analysis around Wilshire Vermont and Del Mar Stations

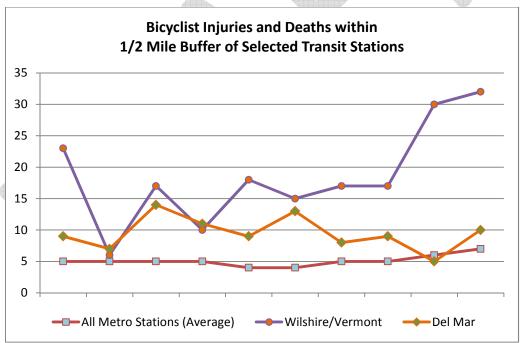
While TODs encourage walking and biking but may result in higher rates of accidents and injuries if not planned appropriately. Using data from the Statewide Integrated Traffic Records System (SWITRS), SCAG staff conducted an analysis of pedestrian/bicycle accidents/injuries around Wilshire Vermont and Del Mar Stations with summary results as below:

- The numbers of fatalities/injuries within each area are small enough that any variations over time appear as significant.
- <u>Del Mar</u> has a lower pedestrian fatality/injury than the average for all Metro stations.
- Wilshire Vermont has a higher pedestrian fatality/injury than the average for all Metro stations.
- Del Mar has had a declining trend in fatal/injury bicycle accidents towards the average with a slight uptick in 2010.
- Wilshire Western has a climbing trend in fatal/injury accidents with an increase in 2009 and 2010.
- Both bicycling and walking fatalities/injuries for Wilshire/Vermont are higher than the average.
- This suggests that mitigation may be necessary. However, additional analysis would be required. Follow up with jurisdictions on the complete street/streetscape surrounding the station areas.
- The more urban areas have higher walking and biking rates, which is associated with higher accident rates.
- Anecdotal evidence regarding bicycles indicates that although accident rates increase, they
 usually increase at a slower rate than the increase in growth in bicyclists once infrastructure
 is in place (e.g., 10% growth in accidents, but a 50% growth in bicycling).

	ASSESSED.		7000	5050F						
Pedestrian Injuries and Deaths	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
[0.25 Miles]	4									
Del Mar	3	2	3	0	3	3	2	0	0	5
Wilshire/Vermont	12	6	12	17	16	10	13	13	13	16
Average Metro Stations	3	4	4	5	4	4	4	4	4	4

Bicycle Injuries and Deaths	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
[0.5 Miles]										
Del Mar	9	7	14	11	9	13	8	9	5	10
Wilshire/Vermont	23	6	17	10	18	15	17	17	30	32
Average Metro Stations	5	5	5	5	4	4	5	5	6	7





ATTACHMENT 6

SUPPORTIVE LOCAL POLICIES AND BEST PRACTICES

Introduction

Policies and best practices supportive of transit-oriented development (TOD) may make TOD more feasible by creating a TOD-friendly environment. While TOD has gained popularity among planners, engineers, developers, and community leaders over the last decade, it remains limited in practice. A review of literature and interviews with two TOD experts conducted by SCAG staff revealed several challenges faced, including, but not limited to, high financial risk to developers, high initial investment costs, great difficulty to obtain funding, unsupportive regulatory framework, and community resistance.

Local communities have taken a notice of these challenges. They develop and implement solutions to overcome these challenges. A review of literature identified a list of TOD-supportive policies and best practices that have gradually emerged over the last decade. Many of the policies and best practices discussed here are communities' approaches to becoming TOD-friendly. They include, for instance, offering financial incentives, tailoring land use regulations, creating equitable TOD through density bonus, managing parking, adopting detailed and high-quality design and development guidelines and standards, managing and conserving natural resources in TOD, streamlining environmental review and entitlement, forming partnerships, TOD governance, establishing TOD through marketing, and community engagement and support through education.

Designing a set of solutions to meet TOD challenges that will work for a community requires a deep understanding of what makes TOD work and what does not make TOD work in that particular community. Since TOD-supportive polices and best practices vary from one community to another due to factors such as local market economy and demographics, the policies and best practices discussed here are merely examples of solutions. While TOD may not be feasible at all locations or in all communities, there are things communities can do to gradually mix in the needed ingredients for TOD, thereby expanding the existing real estate development portfolio to include TOD, alongside single-family development, multifamily development, and so on.

Policies and best practices discussed here are offered as inspiration for options in a toolkit. Each has varying effects depending on the scale of its application. TOD-supportive tools can and should be mixed, matched, modified, or replaced to fit the needs of a particular community. In addition, good design, selection, and implementation of TOD-supportive tools are a process that requires a continuous monitoring and assessment on the performance of TOD tools implemented over time. Hence, the concept of "supportive local polices and best practices" is a function of space, scale, and time.

TOD Financing

TOD is perceived to entail higher risks and costs than typical suburban development. Communities can demonstrate support for TOD by providing financial incentives to entice developers to engage in TOD investment decisions.

TOD Financing

TOD financing mechanisms may include the following examples. Some of these are the same for real estate development in general, or real estate projects in lower income communities that require some assistance.

- 1. Property tax exemption
- 2. Tax abatement to underwrite the development costs
- 3. Tax increment financing around major transit stations, even if they are located outside redevelopment areas
- 4. Grants
- 5. Location efficient mortgage (LEM) to increase demand for TOD by allowing households with lower transportation expenses to qualify for larger mortgage loan amounts and lower down payments
- 6. Subsidies (i.e. HUD's multiple-family housing mortgage guarantee program; extra floor subsidy to stimulate higher densities)
- 7. Credits (i.e. transportation impact fee credits)
- 8. Local development or impact fees or taxes waiver, reduction, or deferral
- 9. Bonds (i.e. tax-exempt housing revenue bond financing)
- 10. General development funds
- 11. State or federal transportation funding based on the rationale that land use influences transportation; therefore, transportation funding could be used to support TOD investments

TOD Infrastructure Financing

A typical TOD has two components – the physical structure above the ground and the infrastructure below the ground. TOD researchers sometimes associate these two components with a color scheme – a gold-and-gray color combination. The gold represents the physical TOD structures while the gray represents the infrastructure.

TOD infrastructure strategies can be applied at different geographic scales.⁴ The following information on TOD infrastructure financing at different geographic scales is collected from a recent report on TOD infrastructure financing by the U.S. EPA.

- 1. Station and station-area infrastructure financing strategies. Case studies include West Dublin BART Station (Dublin, California), New York Avenue-Florida Avenue-Gallaudet University Metrorail Station (Washington, D.C.), and Denver Union Station (Denver, Colorado).
- 2. District and downtown infrastructure financing strategies. Case studies include Downtown Stamford (Stamford, Connecticut), New Quincy Center (Quincy, Massachusetts), and White Flint Sector Plan (Montgomery County, Maryland).
- 3. Transit corridor infrastructure financing strategies. Case studies include Dallas Tax Increment Financing for TOD (Dallas, Texas) and Atlanta Beltline (Atlanta, Georgia).
- 4. Regional TOD infrastructure initiatives. Examples include the San Francisco Bay Area's Transportation for Livable Communities and Transit-Oriented Affordable Housing Acquisition Fund. An example of the regional TOD investment framework is Twin Cities' Central Corridor Light Rail and the Central Corridor Funders Collaborative.

Financing TOD infrastructure is challenging. To meet this challenge, communities use a number of creative financing methods, and they generally fall into six categories.⁵

Category 1: Direct Fees

Direct fees charge people at a rate for using public infrastructure or goods. There are two types: 1) user fees and transportation utility fees and 2) congestion pricing. The former sets a rate for the use of public infrastructure or goods such as water or wastewater systems. Local governments or utilities might be able to issue bonds backed by user fee revenue to pay for new or improved infrastructure. Such fees and rates are typically set to cover a system's yearly operating and capital expenses, including annual debt service for improvements to the system. Congestion pricing manages demand for services by adjusting prices depending on the time of day or level of use.

Category 2: Debt

Debt tools are mechanisms for borrowing money to finance infrastructure. Local governments can access credit through private financial institutions (i.e. bank-owned private debt), the bond market (i.e. general obligation bonds, revenue bonds, or private activity bonds), or specialized mechanisms (i.e. state infrastructure banks or grant anticipation revenue vehicle bonds^{6,7}) that the federal government and states have established for financing particular types of infrastructure.

⁴ United States Environmental Protection Agency, Office of Sustainable Communities, Smart Growth Program. January 2013. *Infrastructure Financing Options for Transit-Oriented Development*. Available at: http://www.epa.gov/smartgrowth/pdf/2013-0122-TOD-infrastructure-financing-report.pdf ⁵ Ibid.

⁶ Ibid.

Category 3: Credit Assistance

Credit assistance improves a borrower's creditworthiness by providing a mechanism that reduces the chances of a default. Federal and state agencies have developed a variety of financial tools to help communities access credit to expedite infrastructure projects. However, this tool requires some source of revenue to pay back debt, and its use does not depend on the strength of the local real estate market.

Category 4: Equity

Equity tools allow private entities to invest (i.e., take an ownership stake) in infrastructure in expectation of a return. Unless communities are willing to directly pay the private partner for constructing, financing, operating, and/or maintaining a facility, equity sources are typically available only for infrastructure that generates a significant return, such as parking facilities. Infrastructure investment funds are pools of funds collected from many investors for the purpose of investing in infrastructure, often in the form of a public-private partnership. These funds are typically repaid through user fees.

Category 5: Value Capture

Value capture tools capture a portion of the increased value or savings resulting from publicly funded infrastructure. Depending on the tool, value capture can entail the creation of a new assessment, tax, or fee (i.e. a special tax or development impact fee); the diversion of new revenue generated by an existing tax (i.e. tax-increment financing); or a revenue-sharing agreement that allows a government agency to share some of the revenue generated by developing publicly owned land (i.e. joint development). Value capture tools are generally most applicable to strong real estate markets because they depend on new development or property value appreciation to generate revenue. Tax increment financing, waiver of development or impact fees, and joint development are examples of the value capture tools.

Category 6: Grants

Grants are funds that do not need to be paid back and are typically provided by a higher level of government to a lower level of government. Both federal and state grants for TOD infrastructure exist. At the federal level, there are transportation grants and community and economic development grants (i.e. Economic Development Administration Grants) that can be used for TOD infrastructure. Besides grants, there are philanthropic funding sources. Foundations, including

⁷ Grant anticipation revenue vehicle (GARVEE) bonds "are federally tax-exempt debt mechanisms backed by federal appropriations for transportation projects that are not expected to generate revenue." "Most commonly used for highway construction, GARVEE bonds can also be used for transit and other transportation projects funded by other federal grant programs [...]. Local governments must work with [metropolitan planning organizations] and state departments of transportation to access GARVEE bonds, which also must be approved by the U.S. Department of Transportation (DOT)."

private foundations and public charities, are nongovernmental organizations that make grants with a charitable purpose.

TOD Green Infrastructure Financing

TOD creates opportunities to incorporate green infrastructure and gradually change the infrastructure color from gray to green. Green infrastructure incentive programs share the similar financing mechanisms with those used for TOD financing and TOD infrastructure financing. To encourage green infrastructure development, communities use expedited permitting, decreased fees, zoning upgrades, reduced stormwater requirements, grants, rebates, installation financing, and impact fees discounts (i.e. stormwater fee discount for customers who reduce impervious cover with green infrastructure practice). In addition, through joint development, communities or public agencies could encourage green infrastructure by splitting or sharing its construction costs with developers and recovering the costs from the revenue generated during TOD operation.

Land Use Regulations in Planning Documents

Transit investment does not consistently lead to significant land use changes. The land use changes that do occur are facilitated by a TOD-complementary regulatory framework. When zoning and land use policies are conducive to TOD, they are tailored to suit TOD needs. However, land use policies and zoning alone are not enough to identify, preserve, enhance, or create TOD opportunities. They need to be planned and used together with other TOD-supportive policies and practices.

Land Use Regulations

Because zoning codes control, manage, and enforce land uses, they have the ability to affect the prospect of TOD projects. Zoning codes are part of local communities' planning efforts and programs. Zoning codes that promote TOD projects include, but are not limited to, waiver of floor-area ratio (FAR) restrictions, waiver of height restrictions, density bonus, inclusionary zoning (to encourage mixed-uses), and floating or overlay zoning (to allow flexibility in areas where desired uses are permitted). Ideally, communities should consider amending and adopting TOD-friendly zoning codes while reviewing and correcting other code provisions that discourage TOD projects before a developer applies for a zoning change. Not only could this proactive approach provide more flexibility for areas that are suitable for TOD projects, but it could also help streamline the entitlement process and allow communities to lead rather than follow TOD projects.

The first method of tailoring land use regulation is to amend existing zoning codes. One purpose of the amendment includes allowing high-density development in proximity to transit stations. For instance, the existing zoning code that allows a height of 15 feet or one building story and an FAR of 2.5 can be amended to allow for a mixed-use, high-density TOD project that is 50 feet in height, three to four stories, and that has a total FAR of 4.0. The Del Mar Gold Line Station TOD project in the City of Pasadena, California is with the City's Central District (CD). This zoning district has a primary purpose, which is to provide for a diverse mix of land uses with an emphasis on a higher

density, mixed-use environment. It emphasizes the concept of a higher density, mixed-use environment that will support transit- and pedestrian-oriented mobility strategies. The maximum building height for the area in which the Del Mar TOD project is located is 60 feet with an additional 15 feet in height permitted utilizing a height average, and the maximum FAR permitted for the area is 2.25. 9,10

The second method of tailoring land use regulation is to create floating or overlay zoning. An overlay zoning applies supplemental zoning provisions to a specific area without disturbing requirements of the basic use district. Because it allows development flexibility in places where higher density development is desirable, and because it addresses zoning conflicts by going with the stricter requirements, communities, such as the City of Seattle, use this method to promote TODs. The City of Seattle passed its Station Area Overlay legislation in 2001, which created Station Area Overlay Districts around eight future light rail stations. The provisions included in such Districts aimed at encouraging housing development and discouraging automobile-oriented development. As another example, the City of Pasadena passed its North Lake Specific Plan Overlay District. The purposes of this District are, among others, to 1) provide an environment that encourages people to walk by creating spaces for pedestrian activity, 2) minimize vehicle intrusions into pedestrian areas and by limiting total number of uses involving automobiles, and 3) support development that is oriented to use the light-rail station (Metro Gold Line) at Lake Avenue.

Creating new zoning classifications is another technique. Unlike the floating or overlaying zoning, new zoning classifications have the advantage of creating zoning districts that are specifically customized to achieve TOD goals and objects. For example, the City of Riverside has mixed-use zones of three types: mixed-use neighborhood, mixed-use village, and mixed-use urban.¹³ The three mixed-use zones were established to provide development opportunities for integrated, complementary residential and commercial development on the same parcel or a contiguous group of parcels. In addition, providing opportunities for TOD was another purpose explicitly listed for the mixed-use zones. Outside the SCAG region, in Gresham, Oregon, four new zones were created

⁸ City of Pasadena. Accessed 13 June 2013. *Article 3 – Specific Plan Standards*. Available at: http://ww2.cityofpasadena.net/zoning/P-3.html#figure3-6

⁹ City of Pasadena. Accessed 13 June 2013. *Figure 3-8 – Central District Maximum Height*. Available at: http://ww2.cityofpasadena.net/zoning/images/UpdatedJPG_PDF_maps/3-8.pdf

¹⁰ City of Pasadena. Accessed 13 June 2013. *Figure 3-9 – Central District Maximum Floor Area Ratio*. Available at: http://ww2.cityofpasadena.net/zoning/images/UpdatedJPG_PDF_maps/3-9.pdf

¹¹ Goodwill and Hendricks. November 2002. *Building Transit Oriented Development in Established Communities*. Center for Urban Transportation Research. Tampa, Florida.

¹² City of Pasadena. Accessed 13 June 2013. *Chapter 17.34 – North Lake Specific Plan*. Available at: http://ww2.cityofpasadena.net/zoning/P-3.html#17.34.020

¹³ Riverside Municipal Code. Riverside, California. *Chapter 19.120 Mixed-Use Zones (MU-N, MU-V, MU-U)*. Available at: http://www.riversideca.gov/municode/pdf/19/article-5/19-120.pdf

around a light rail station, and they allowed an intermixing of land uses that must be in compliance with transit-supportive development standards.¹⁴

Citywide Planning Documents

Communities can express their support for TOD projects in or near transit investment locations in their planning documents. In any citywide planning documents, such as general plans, communities can outline their goals, objectives, and policies to promote TOD-feasible areas. High-level planning documents for a large area, such as general plans, set forth development tones and envision the future that could be either TOD- friendly or TOD- antagonistic. The planning efforts and programs for each topic area (i.e. open space and conservation, housing, and education) within general plans, though they may appear irrelevant to TOD planning efforts on the surface, have the potential to indirectly improve or limit TOD opportunities and affect the quality of such opportunities around transit stations and feeder bus routes. For instance, under the Education Element in its General Plan 2025, the City of Riverside adopts policies to provide a bicycle network, using the complete-street approach. To support safe routes to schools, the City develops a policy to recommend locating transit facilities near education facilities.

Specific Plan, Neighborhood or Community Plan, Transit Area Plan

Communities can facilitate TOD projects by creating a policy environment that is conducive to a particular area at a small scale. Through procedures, policies, plans, and programs that are more tailored to and focused on the uniqueness of a particular area than high level planning documents (i.e. general plans), planning documents at a smaller geographic scale are more effective at respecting and enhancing the existing local conditions and characteristics. Because these planning documents are more responsive to the local economy, real estate market, community characters, and neighborhood needs, they provide additional opportunities for communities to adopt TOD-supportive land use.

Planning documents with a narrow focus include specific plans, neighborhood or community plans, and transit area plans. In these parcel-level planning documents, planners can, for example, create zoning codes that are more responsive to the local housing demand, allow increased density in appropriate areas, provide public improvements that are just right for each development area, and develop customized marketing and community outreach strategies for immediate implementation.

Instead of treating parcel-level planning documents as cookie cutters, those can be customized so that they are TOD-descriptive, not TOD-prescriptive. For planning documents with a zoomed-in focus, identify and rank TOD sites by their readiness for an immediate development within a planning area

¹⁴ Goodwill and Hendricks. November 2002. *Building Transit Oriented Development in Established Communities*. Center for Urban Transportation Research. Tampa, Florida.

¹⁵ City of Riverside. Adopted November 2007. *Riverside General Plan 2025. Education Element*. Available at: http://www.riversideca.gov/planning/gp2025program/GP/09_Education_Element.pdf ¹⁶ Ibid.

– for instance, TOD-priority sites, TOD-ready sites, and TOD-potential sites – if the entire planning area is not a transit area. As examples, Pasadena's Central District Specific Plan and Riverside's Magnolia Avenue Specific Plan were adopted to promote a diverse mix of land uses and establish a community node with public spaces and pedestrian-oriented features. These documents can inform planners of economic challenges and neighborhood changes of a planning area so that the best development combinations that work for that area will be implemented.

Not only can planning documents with a narrow focus help control land uses at a greater level of detail, but they also create opportunities for incorporating and mandating any specific TOD supportive tools. Adopted in June 2009, the Eastside Neighborhood Plan of the City of Riverside designated mixed-use areas, and for each objective that promotes this designation, the plan enlisted a set of tools, responsible agency, and approximate time frame. One of the tools to pursue development opportunities on land owned by the transit agency is to establish a working relationship with Riverside County Transportation Commission (RCTC) by the development housing division, and the required time frame is six years or more.¹⁹

Equitable TOD

Offering a broad range of housing options allows residents at all income levels to freely choose where they want to live. Creating and preserving affordable housing allows residents at moderate to low income levels to live near employment, neighborhood amenities and services, and public transportation. Equitable TOD helps minimize displacement and preserve the social threads and fabrics of existing communities that gentrification will likely unweave.

Creating Affordable Housing through Density Bonus

One of the commonly used zoning incentives to create equitable TOD and build affordable housing is through the use of density bonus. Density bonus is granted for projects for which developers agree to include a certain number or percentage of affordable housing units for residents with a moderate income, a low income, and/or a very low income. For every one affordable housing unit built, construction of a greater number of market rate units is allowed than otherwise. Density bonuses vary from one community to another, and from project to project. Typically, it does not exceed a particular threshold, for instance, 20 percent of the normal density determined by local zoning codes.

The City of Pasadena has a provision for a density bonus allowance, and it applies only to multifamily development projects consisting of five or more dwelling units.²⁰ The Del Mar Gold Line TOD

¹⁷City of Riverside. Adopted 10 November 2009. *Magnolia Avenue Specific Plan*. Available at: http://www.riversideca.gov/planning/pdf/SpecificPlans/Magnolia-Avenue/Final-Adopted-MASP.pdf ¹⁸ City of Pasadena. Accessed 24 June 2013. *Chapter 17.30 – Central District Specific Plan*. Available at: http://ww2.cityofpasadena.net/zoning/P-3.html#17.30.010

¹⁹ City of Riverside. Adopted 16 June 2009 per Resolution 21841. *Eastside Neighborhood Plan*. Available at: http://www.riversideca.gov/planning/pdf/Neighborhood-Plans/eastside/Eastside-Neighborhood-Plan-Final.pdf ²⁰ City of Pasadena. Accessed 13 June 2013. *Chapter 17.43 – Density Bonus, Waivers and Incentives*. Available at: http://ww2.cityofpasadena.net/zoning/P-4.html#17.43.040

project has a total of 347 housing units, and 21 of them are affordable units. Similar to the use of density bonus to encourage affordable housing, consider using this incentive to encourage the provision of community services that are important to the residents on site (e.g., child day-care facility). For instance, the City of Pasadena allows floor area bonus and concessions for child day-care facility for a development project if such a project complies with the density bonus requirement and includes a child day-care center that will be located on the premises of, as part of, or adjacent to, the project. As another example, the City of Riverside provides a density bonus or concession for a childcare facility if childcare facilities are determined inadequate for the subject area. 22

Another example of density bonus in practice is the County of San Diego's four density bonus policies that target residents from different environmental justice categories (i.e. income and age). Although not all of these policies apply to TOD, communities could draw some inspiration from them and design the density bonus policies that work the best for them. "The State Density Bonus Law allows a 25% increase in the number of housing units with the requirement that for the next 30 years, at least 10% of total units be reserved for very low-income households, or 20% of total units be reserved for low-income households, or 50% of total units be reserved for qualifying senior citizens" while "[t]he Affordable Housing for the Elderly Program targets senior citizens [...]."²³ In addition, the Mobile-Home Park Density Bonus targets mobile home park development, and the Housing for Lower Income Families Program "allows the development of low-income housing with up to 20 units per acre in designated areas, provided that all of the units are affordable to low-income families."²⁴

To ensure a full compliance with the density bonus allowance, communities should consider elevating the density bonus request to a legal agreement with interested developer(s) and subsequently recording the agreement. Make the development condition (i.e. affordability or provision of community facilities) run with the land so that it will be binding upon developer(s) and any of their heir, successor, or assignee. In its Bonus Density section, the City of Riverside explicitly requires a recorded Affordable Housing Agreement, which requires that "[a]n applicant shall agree to continued affordability of all low-income, very low-income and senior citizen housing developments with density bonus units for at least thirty (30) years."²⁵

Preserving Affordable Housing

²¹ Ihid

²² Riverside Municipal Code. Riverside, California. *Article VIII: Site Planning and General Development Provisions Chapter 19.545. Density Bonus*. Available at: http://www.riversideca.gov/municode/pdf/19/article-8/19-545.pdf

²³ Washington Area Housing Partnership. Accessed 27 June 2013. *Density Bonuses*. Available at: http://www.wahpdc.org/densitybonus.html ²⁴ lbid.

²⁵ Riverside Municipal Code. Riverside, California. *Article VIII: Site Planning and General Development Provisions Chapter 19.545. Density Bonus*. Available at: http://www.riversideca.gov/municode/pdf/19/article-8/19-545.pdf

Use tools to preserve existing affordable housing while building new affordable units helps expand the affordability. Generally, preserving affordability requires fewer resources than new construction, and preservation allows current residents to stay in their homes. "[T]ools like deed restrictions, housing trust funds, rehabilitation assistance, and Low-Income Housing Tax Credits can maintain housing choices and access to opportunities for low-and moderate-income families in revitalizing areas and catalyze investment in struggling neighborhoods." ²⁶ In California, the California Housing Partnership provides expertise in affordable housing preservation. ^{27,28} Additionally, the National Housing Law Project, the National Housing Trust, and National Alliance of HUD Tenants provide technical assistance on preserving privately-owned subsidized affordable housing. ²⁹

Parking Management

Develop a good and workable parking program for the transit station areas with flexible parking standards that are just right for the circumstances and needs of each individual TOD site. Parking programs can sometimes tip the balance toward making conditions more favorable to transit and less favorable to automobile travel. Illustrative strategies include implementing a flexible parking program to relax parking requirements, restricting the availability of parking, and raising the cost of parking to the extent that is politically and economically feasible. The San Francisco Municipal Railway developed a parking program around the 3rd Street light rail project that provides more onstreet and shared parking.³⁰ In Portland, Oregon, parking maximums in the downtown area replace minimum parking requirements and allow less parking near its light rail stations.³¹ In Florida, the City of Orlando sets the maximum number of parking spaces for retail at four spaces per 1,000 square feet of gross floor area and has a lower than normal minimum parking requirement of 2.5 spaces per 1,000 square feet of gross floor area.³²

In its peer reviewed report on parking pricing and management, the Denver Regional Council of Governments identified a set of best approaches to parking pricing that are being implemented by three other transportation agencies. Each approach is tailored to a segmented sub-market for access to transit (i.e. short-term parkers, commuters seeking guaranteed reserved station parking, occasional daily commuters traveling at peak hours, park-shop-and-ride travelers, and long-term parkers such as those using transit to get to the airport or intercity train station). The best

²⁶ United States Environmental Protection Agency, Office of Sustainable Communities, Office of Environmental Justice. February 2013. *Creating Equitable, Healthy, and Sustainable Communities: Strategies for Advancing Smart Growth, Environmental Justice, and Equitable Development*. Available at:

http://www.epa.gov/smartgrowth/pdf/equitable-dev/equitable-development-report-508-011713b.pdf ²⁷ California Housing Partnership Corporation. Accessed 27 June 2013. Available at: http://www.chpc.net/

²⁸ PolicyLink. Accessed 27 June 2013. *Affordable Housing Development*. Available at: http://www.policylink.org/site/c.lklXLbMNJrE/b.5137223/k.9AAB/Goals_To_Tools.htm#6 ²⁹ lbid.

³⁰ Goodwill and Hendricks. November 2002. *Building Transit Oriented Development in Established Communities*. Center for Urban Transportation Research. Tampa, Florida.

³¹ Ibid.

³² Ibid.

approaches include 1) daily parking fees by the Bay Area Rapid Transit (BART) at four stations along the San Francisco International Airport/Millbrae extension; 2) premium, monthly reserved parking by the Washington Metropolitan Area Transit Authority (WMATA) and the BART at \$55 and \$30-\$115 per month, respectively; 3) short-term metered parking by TriMet at \$0.50 per hour with a five-hour time limit in the Portland area; 4) long-term or multi-day parking by the BART at a rate of \$5.00-\$6.00 per day.³³

To complement the reduction of parking supply in TOD, communities in California could take advantage of the State's Parking Cash-Out Program. Authorized as the agency for interpreting and administering the Parking Cash-Out Program, the California Air Resources Board (CARB) determines that employers with over 50 employees in an air basin designated nonattainment for any state air quality standard must offer a parking cash-out program to those employees who have the availability of subsidized parking that meet certain criteria. This program is a result of the 1998 amendments to the Internal Revenue Code by the federal Transportation Equity Act for the 21st Century (TEA-21). Under this strategy, a qualified employer offers to provide a cash allowance to an employee equivalent to the parking subsidy that the employer would otherwise pay to provide the employee with a parking space.

Design and Development Guidelines and Standards

TOD supportive design and development guidelines and standards are another proactive approach that communities are undertaking to promote TOD in suitable areas. It includes TOD-supportive and -compatible structural design features, complete streets, and livable communities. Because TOD design is multidimensional, comprehensive, and holistic, it would require expertise and experience from an interdisciplinary team.

TOD Structural Design Features

Treat design guidelines and standards as an opportunity to promote TOD projects. TOD-supportive and –compatible structural design features include, but are not limited to, adding new indoor or outdoor public spaces; mandating a provision for bicycle parking spaces in residential and commercial development in the vicinity of transit stations; providing neighborhood amenities and open and green spaces; and supporting social functions and community services. While developing design guidelines and standards, consider language to encourage, enhance, and require, if desired, green building design codes, preference for using green building materials, and onsite installation of green infrastructure. There is no limitation or boundary when it comes to what can go into the

³³ Nelson | Nygaard Consulting Associates. May 2010. *Denver Regional Council of Governments Transit Agency Parking Pricing and Management Practices Peer Review*. Available at:

http://tod.drcog.org/sites/default/files/documents/Transit%20Agency%20Parking%20Pricing%20and%20Management%20Practices_%20Peer%20Review.pdf

³⁴ California Environmental Protection Agency Air Resources Board. August 2009. *California's Parking Cash-Out Program, An Informational Guide for Employers*. Available at: http://www.arb.ca.gov/planning/tsaq/cashout/cashout guide 0809.pdf

design guidelines; however, the key is to have as detailed and high-quality design guidelines and standards as possible for all users. Because the overall appearance and character of TOD structures are difficult to quantify and standardize, it is recommended to create a design review board or a similar group to review compliance with TOD-supportive and –compatible structural design features.

TOD place-making – creating a livable and dynamic TOD as a place instead of a space – good design is a process of assessing, selecting, reselecting, and implementing a wide variety of TOD-supportive and compatible design features. Attention should be given to the uniqueness of each station areas and incentivize developers, both financially and procedurally, to incorporate even the smallest of design details. Although incorporation of detailed and high quality design codes includes upfront capital costs by developers, the final result will likely be high quality.

Seven TOD projects offered empirical sources for twelve principles of good designs that focus on processes, places, and facilities.³⁵ Three of these TOD projects are in the State of Virginia, one in the State of Missouri, one in the State of Illinois, and two are in the Oakland area. The twelve principles of good design include the following:

- 1. Appreciate that planning and developing great places takes time;
- 2. Engage the public and experts as collaborators;
- 3. Program use of space;
- 4. Invest in maintaining spaces;
- 5. Design at a human scale;
- 6. Provide public spaces that accommodate a variety of uses and users;
- 7. Use design and programming strategies to increase safety;
- 8. Allow for variety and complexity;
- 9. Create connections between spaces;
- 10. Design sidewalks and crosswalks for appropriate pedestrian use;
- 11. Integrate transit and transit facilities into urban pattern; and
- 12. Don't forget (but don't overemphasize) car movement and parking.³⁶

Complete Streets

Communities are implementing strategies to make streets safe, walkable, accessible, and enjoyable for users of all ages and abilities. Some of the structural design guidelines and standards discussed above are also relevant to street designs (i.e. street transportation, traffic, circulation). Strategies that could be used to bolster the "ABC" (accessibility, bikability, and connectivity) of TOD include complete and shared streets, a web of transit and user-friendly bus stops, pedestrian and bicycle pathways, and connection with open spaces through bicycle routes and greenways. Design attributes in support of walkability include short street blocks, multiple intersections, pedestrian crossings at

³⁵ Justin Jacobson and Ann Forsyth. 2008. *Seven American TODs: Good Practices for Urban Design in Transit-Oriented Development Projects*. Available at: http://www.jtlu.org/index.php/jtu/article/download/67/34 ³⁶ lbid. page 25.

major roads, continuous sidewalks, legible street patterns, street landscaping and lighting, and benches.

TOD-supportive complete streets policies have been adopted at the state, regional, county, and local levels. The California legislature adopted the Complete Streets Act (AB 1358) in 2008. In the same year, the California Department of Transportation adopted the Deputy Directive 64-R1. In 2006, the Metropolitan Transportation Commission in the San Francisco Bay Area adopted a regional policy for the Accommodation of Non-Motorized Travelers. The Marin County in the northern San Francisco Bay Area, California, approved the Best Practices Directive for Inclusion of Multimodal Elements into Improvement Projects in 2007. Since 2006, nearly 488 communities in the nation have adopted some form of complete streets policy. In the SCAG region, they include the following six cities.³⁷

	City Legislation	egislation Complete Street				
		Ordinance, Resolution, and Policy				
1.	Rancho Cucamonga, CA	Ordinance No. 867	2012			
2.	Hermosa Beach, CA	Living Streets Policy	2012			
3.	Huntington Park, CA	Resolution No. 2012-18	2012			
4.	Baldwin Park, CA	Complete Street Policies	2011			
5.	Ojai, CA	Complete Street Policies	2011			
6.	Azusa, CA	Complete Street Policies	2011			

Complete streets foster livable communities. However, streets are not complete if they are not designed with all users in mind. Regardless age, ability, or mode of transportation, complete streets ensure users can get to their destination easily, quickly, safely, and enjoyably. Streetscapes that benefit all users, especially vulnerable street users (i.e. children and elderly) include, for instance, retiming signals to account for slower walking speed, shortening crossing distances with median refuges or sidewalk bulb-outs, constructing curb cut-outs and street benches, creating sitting or resting areas, and mounting clear street signs with large size of font. ^{38,39} Hence, streets that are built and improved today will serve all populations' needs and meet tomorrow's challenges.

Finally, it should be noted that every transit trip involves active transportation (walking or biking) for access to (first mile) or from transit stations to destinations (last mile). All transit riders must confront the first-last mile challenge, and the easier it is to access the system, the more likely people are to use it.

Complete and Livable Communities

³⁷ Smart Growth America. April 2013. *The Best Complete Streets Policies of 2012*. Available at: http://www.smartgrowthamerica.org/documents/cs-2012-policy-analysis.pdf

³⁸ Smart Growth America. Accessed 5 July 2013. *Benefits of Complete Street, Complete Streets Improve Mobility for Older Americans*. Available at: http://www.smartgrowthamerica.org/documents/cs/factsheets/cs-older.pdf ³⁹ AARP Public Policy Institute. 2009. *In Brief: Planning Complete Streets for an Aging America*. Available at: http://assets.aarp.org/rgcenter/il/inb167_streets.pdf

Design and manage a TOD to give a sense of a complete and livable community. This includes placing the TOD in a close proximity to transportation arterials (i.e. freeways, transit stations, and bus lines) and existing neighborhood amenities (i.e. schools, recreational facilities and parks, and retailer centers such as a neighborhood grocery store). In addition, providing a wide choice of amenities and personal retail spaces (i.e. beauty salon, dry cleaners, financial services) on site will just be a trip down to the ground level of the same building for the tenants residing on site. Neighborhood amenities can also provide personal services to surrounding communities, thereby decreasing local traffic with reduced vehicular trips in localized areas.

Make all users of the TOD site feel they belong to a complete and livable community through a pedestrian- and resident-friendly design. As discussed above, this design focuses on walkability, connectivity, transparency, aesthetics, and compatibility with the existing community at large in which a TOD is located. A number of strategies are available to make this community design concept a reality. They include, for instance, creating a focal point inside an open triangular shape to give a feel of "a community within another community at large;" aligning retail spaces with major transportation corridors where most of the foot traffic will take place while placing residential units far away; orienting residential units to maximize natural lighting and fresh air penetration; connecting pedestrians and shoppers with on-site neighborhood amenities and personal retail services through pathways; and providing accessible means of ingress and egress for all users of all modes of transportation in all directions.

In the SCAG region, the Wilshire/Vermont TOD on the Red Line is a successful example of creating a livable and sustainable community. Located in the urban area of the City of Los Angeles, the Wilshire/Vermont TOD includes apartments (20% affordable units), bus layover spaces, subway access, ground-level retail spaces, and a public plaza with sitting areas in the center. According to a 2010 case study completed by the Federal Transit Administration, the Wilshire/Vermont TOD demonstrates the following livability highlights.

- 1. Provide a range of transportation choices for residents, the surrounding community, and employee:
- 2. Promote equitable, affordable housing by making nearly 20 percent of new housing units affordable;
- 3. Enhance economic competitiveness by providing residents with easy access to employment centers in downtown Los Angeles and other locations along the Red Line;
- 4. Support existing communities by providing improved Metro access, public space, retail, and educational opportunities (i.e. a 800-student middle school) for the surrounding neighborhoods;

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⁴⁰ U.S. Department of Transportation, Federal Transit Administration. Summer 2010. *Livable and Sustainable Communities Regional Case Studies – Region IX, Wilshire/Vermont, Red Line, Los Angeles, CA.* Available at: http://www.sustainablecommunities.gov/pdf/studies/Region9 VermontWilshire.pdf

- 5. Coordinate policies and leverage investment because it used funding from a variety of local, state, federal, and private sources; and
- 6. Value communities and neighborhoods by establishing a vibrant and walkable urban environment and a safe access to transit, shops, and school.⁴¹

The LEED for Neighborhood Development (LEED-ND) by the U.S. Green Building Council enlists measurable standards for smart, sustainable, and green community designs. The LEED-ND Rating System focuses on the community as a whole by integrating green design concepts and principles such as smart location and linkage, neighborhood pattern and compatibility, green infrastructure and structures, energy conservation, and material recycling and reuse. There is an emerging trend to use the LEED-ND standards in the TOD and transit area planning among planners, engineers, and architects. Because LEED-ND is designed to promote healthy living, it can be used as a strategy to create environmentally, economically, and socially sustainable and livable communities.

Interdisciplinary TOD Design and Development Team

TOD supportive design and development guidelines and standards require expertise and experience from an interdisciplinary team. These guidelines and standards, which appear in planning documents, encompass a range of subject areas from urban design, energy, water supply and consumption, to housing, and civil engineering. TOD-supportive design and development practices go beyond the land use and zoning section in a planning document. To materialize the potential success of TOD, forming an interdisciplinary team, both inter- and intra-agency, is necessary. For instance, the team may include people with TOD-related expertise and experience. Disciplines that are relevant to TOD design and development guidelines and standards include, but are not limited to, land use, planning, environmental compliance, transportation, market and economic analysis, urban design, engineering, legal, marketing and education, and public relations.

Natural Resources Management and Conservation

Promoting a high quality of life in TOD could be achieved by balancing the natural and built environment. Closely related to the two categories of TOD policies and practices discussed above (urban design guidelines and standards and green infrastructure), an environmentally sustainable TOD conserves and sustains the natural environment. Resources such as water, timber, soils, agricultural resources and farmlands, nonrenewable energy sources, and green spaces are within the natural environment. Using nature-friendly development practices for the TOD design protects natural assets and reduces the impact of development on natural resources.

Green Infrastructure

⁴¹ Ihid

⁴² National Resources Defense Council. Accessed 1 July 2013. *A Citizen's Guide to LEED for Neighborhood Development*. Available at: http://www.nrdc.org/cities/smartgrowth/files/citizens_guide_LEED-ND.pdf ⁴³ U.S. Green Building Council. 2008. Accessed 1 July 2013. *LEED for Neighborhood Development Rating System*. Available at: http://www.usgbc.org/DisplayPage.aspx?CMSPageID=148

Green infrastructure is an approach communities are using to address the delicate balance between the natural and built environment. It allows communities to maintain healthy waters, provides multiple environmental benefits, and supports sustainability. "Unlike single-purpose gray stormwater infrastructure, which uses pipes to dispose of rainwater, green infrastructure uses vegetation and soil to manage rainwater where it falls. By weaving natural processes into the built environment, green infrastructure provides not only stormwater management, but also flood mitigation, air quality management, and much more."

As the elected regional government for the Portland metropolitan area, Metro implements green infrastructure in its development. They include:

- 1. Tree planting and retaining on-site vegetation;
- 2. Landscaping with native plants;
- 3. Soil amendments and composting;
- 4. Pervious pavers, concrete and/or asphalt for roads, driveways and parking lots; and
- 5. Green street [*sic*] and bio retention features such as curb cuts, swales and rain gardens, ecoroofs [...]. 45

A nature-friendly practice by Metro in the Portland metropolitan area is the Buckman Height Apartments. This apartment complex sits on a two-acre redevelopment site. The complex is organized around a main courtyard with two 18-by-45 foot planting beds designed as rain gardens to filter and absorb the stormwater from the buildings' downspouts.⁴⁶

Marketing Green Infrastructure and Nature-Friendly TOD

Like the TOD marketing and education strategies, policies and practices that are incorporated into the design of a TOD to manage and conserve natural resources need to be branded, packaged, and marketed. Successful case studies also need to be recognized and awarded. The award and recognition programs can help increase the public awareness of nature-friendly TOD and green infrastructure. The same marketing and education materials and strategies used for TOD projects can be used here.

A Nature-Friendly Built Environment

A sustainable TOD is a catalyst for creating a nature-friendly built environment in which a TOD is located. The built environment refers to the human-made environment that provides settings for human activities (i.e. living, working, and playing). It encompasses a number of elements, including, but not limited to, humans, buildings, parks, green spaces, roads, highways, telecommunicating

46 Ibid.

⁴⁴ United States Environmental Protection Agency. Last Updated 23 April, 2013. *Water: Green Infrastructure*. Available at: http://water.epa.gov/infrastructure/greeninfrastructure/index.cfm

⁴⁵ Metro. 2013. *Nature-friendly development*. Available at: http://www.oregonmetro.gov/index.cfm/go/by.web/id=24592

systems, and infrastructure. These elements come in different scales, ranging from a building, to a block, to a neighborhood, and to community. It also varies geographically. In addition, the built environment is a manifestation of the social and cultural threads of communities. Apply the above-discussed strategies for building an environmentally sustainable TOD to create a large-scale, nature-friendly, high-quality, human-made space in which people live, work to enjoy.

Environmental Review and Entitlement

Besides land use regulation and zoning incentives, a TOD-complementary regulatory framework includes policy support in the form of a streamlined development review and approval process. One of the challenges faced is the long turnaround time for environmental clearance and entitlement approval for TOD. For instance, the approval turnaround time for planned development in many cities can take up to two years.⁴⁷ Hence, an expedited environmental review and entitlement process for TOD both at the state and local levels will reduce time delays, save soft development costs, and encourage TOD in practice.

State Streamlining Policies and Practices

Expediting the environmental review for planned TOD is achievable through California Environmental Quality Act (CEQA) streamlining bills. The environmental review and entitlement process at the state statutory level needs both flexibility and certainty. Flexibility can be achieved by such things as statutory exemptions, limited environmental reviews, or permit expeditions. In California, certain types of projects (i.e. infill project, infill residential project, and mixed use development project in an infill location in a close proximity to transit) may be eligible for CEQA streamlining permitted by a statutory exemption pursuant to SB 226, SB 375, and SB 743. (It should be noted that AB 417 which exempts bike lane projects from CEQA review is also supportive of TOD implementation).

To ensure certainty of the process, an intergovernmental approach with consolidated steps in the process is encouraged. In most jurisdictions, intergovernmental collaboration is not uncommon. However, TOD requires a stronger degree of synergic intergovernmental working relationship that is built on trust and confidence. To make this happen, all local public agencies responsible for making a TOD a reality should consider the adoption of the 3C's policy – namely, cooperation first, coordination next, and for the purpose of long-term collaboration. This 3C's approach should be mixed into all phases of TOD planning from conception all the way to its opening day. Strategies to implement this 3C's approach include assigning a staff member to work as a full-time liaison for all TOD-related issues and mandating copies of any plans requiring environmental review, entitlement, and discretionary permits to be sent to and reviewed by other responsible public agencies.

Local Streamlining Policies and Practices

⁴⁷ Goodwill and Hendricks. November 2002. *Building Transit Oriented Development in Established Communities*. Center for Urban Transportation Research. Page 14. Tampa, Florida.

As an example, the Puget Sound Regional Council, a planning organization that develops policies and makes decisions about transportation planning, economic development, and growth management throughout the four-county Seattle metropolitan area, lists five ways to streamline the environmental review process:⁴⁸

- 1. Review or consolidate steps in the process;
- 2. Simplify the process by making sure the applicable regulations are organized and easily accessible;
- 3. Review previous appeals to identify regulatory difficulties and opportunities;
- 4. Allow for flexibility in the permit process; and
- 5. Conduct some of the permit steps in advance of the development proposals.

As another example, the City of Pasadena posts an online flowchart to illustrate the legislative review process for all zone changes, master plans, and planned developments and the quasi-judicial review process for all conditional use permits, variances, and tract maps. ⁴⁹ To assist developers, the flowchart includes the seven General Plan Principles and definitions of terms by the City's Planning and Development Department. ⁵⁰

Public Health Concerns and Mitigation Measures

By definition, TOD is development in proximity to transit. Development may be residential, commercial, or mixed-use; therefore, they cluster people and businesses along transit lines (e.g. bus routes, rails). A common concern of TOD is public health from being exposed to air pollution, noise, and vibration. Although the existing CEQA case laws consider potential significant environmental impacts of projects on the physical environment instead of those from the physical environment on the projects and the public brought in the projects, developers should consider design and material strategies to minimize potential air and noise exposures to TOD tenants. Those mitigation measures may include requiring installation of air filtration units and noise buffers on all TOD that are within 500 feet of freeways, and orienting TOD to avoid a downwind position. Local governments may adopt design and development guidelines and standards to fill in the missing pieces in CEQA to address public health concerns of TOD and suggest solutions within their jurisdictions.

Innovative Partnership

TOD requires cooperation, coordination, and collaboration among all stakeholders. Stakeholders include local government agencies, transit agencies, developers, property owners, investors, businesses, community organizations, residents, and the general public. Forming a working relationship and a functional partnership between stakeholders sets the stage for ongoing and open

⁴⁸ Goodwill and Hendricks. November 2002. *Building Transit Oriented Development in Established Communities*. Center for Urban Transportation Research. Page 15. Tampa, Florida.
⁴⁹ Ibid.

⁵⁰ City of Pasadena. Accessed 24 June 2013. *Legislative Review Process*. Available at: www.cityofpasadena.net/WorkArea/linkit.aspx?LinkIdentifier=id&...

communication, which will in turn help set realistic expectations and lead to mutually beneficial outcomes.

Public-and-Public Partnership

Partnerships can take on many forms. One common form is the public-and-public partnership. The collaboration between the City of Los Angeles and the Los Angeles County Metropolitan Transportation Agency (Metro) is an example of the public-and-public partnership. ⁵¹ "The City, Metro, and other stakeholders need more inter-agency and inter-departmental collaboration and coordination to maximize leveraging of resources in support of TOD." ⁵²

Like the collaboration between the City of Los Angeles and Metro, the public-and-public partnership is built upon the intergovernmental cooperation, coordination, and collaboration – the 3C's approach. Strategies to make the 3C's approach a daily practice include: 1) establishing intergovernmental TOD-supportive agreements through, for instance, MOUs and Letters of Intent, to set common development goals and objectives, design a common work plan, agree on lead and shared planning responsibilities, designate a point-of-contact, and allocate limited funds and resources; 2) holding regular meetings of staff representatives throughout the designing, planning, and implementing phases of the TOD process; and 3) administrating TOD projects by having non-planning personnel monitor, manage, and maintain contracts, legal agreements, and budgeting.

Implement the 3C's approach early in the TOD conceptualizing and planning process. If there is an existing and functional working relationship among agencies, negotiating to get "sign off," "exemption," or "expedition" for certain designs may be considered. Agencies would be more likely than not to grant the "signing off," "exemption," or "expedition" if they have "bought into a plan." In addition, incorporate the 3C's approach to every stage of the TOD planning. For instance, while TOD-supportive development and design guidelines and standards are being developed, have an intergovernmental team of representatives from all responsible agencies, if possible, prepare, review, adopt, and sign off on the language. Negotiate a comprehensive set of TOD implementation strategies with all agencies responsible for issuing TOD permits and collecting fees. Lastly, negotiate a consolidated review and permitting approval process to fully utilize the power and strength of the public-and-public partnership.

The collaboration between local and regional public agencies is a type of public-and-public partnership. This type of 3C's presents a unique opportunity in developing and promoting TOD from a regional network perspective. Because transit lines cross jurisdictional boundaries, regional agencies such as transportation commissions and SCAG can work collaboratively with local governments to foster TOD-friendly policies and resolve TOD-deterrent issues in a regional forum.

⁵¹ The Center for Transit-Oriented Development. 1 March 2010. *Creating Successful Transit-Oriented Districts in Los Angeles*. Available at:

http://latod.reconnectingamerica.org/sites/default/files/LA_TOD_Final_Final_Report.pdf ⁵² Ihid.

Strategies to encourage regional TOD dialogs may include conferences, workshops, and other educational programs. Already established work relationships and processes between regional and local government agencies should be utilized. The purpose of regional TOD dialogs is to recognize, create, and improve TOD opportunities by city, county, and regional agencies.

Another type of the public-and-public partnership is working with state public agencies. Both local and regional governments can benefit from engaging in transit and TOD planning dialogs with state agencies. When statewide TOD-friendly regulations and plans are being developed, local and regional governments can participate in the public review process to ensure they will be suitable for the local and regional social, economic, and physical environments. In addition, regional government plays an important role in fostering dialog between local and state agencies. Opportunities to influence statewide TOD-friendly laws, regulations, and administrative policies by local and regional public agencies should be recognized and used together with those between local and regional public agencies.

The definition of the public-and-public partnership is further broadened to include a partnership between the public (government) and the general public. The general public consists of community organizations, non-profit organizations (NGOs), special interest groups, and members of the TOD communities. This all-encompassing definition reflects another determining factor in the TOD's success – community support, which is being discussed in detail below. Therefore, it is important to form a partnership with "the general public" early in the TOD process in order to address any potential community resistance.

Public-and-Private Partnership

Another common form of partnership is between public-and-private entities. A public-and-private partnership is an innovative way to create tools to support TOD. A win-and-win situation is often used to describe this form of partnership. Examples of this public-and-private partnership include those joint developments by a real estate asset development and management program on Metro-owned properties at and adjacent to transit stations and corridors. The purpose is to secure the most appropriate private and/or public sector development on these properties.⁵³

The public-and-private partnership is established to create value for all parties. To TOD developers, the public (i.e. transit agencies) could assist in land assembly, split or share TOD infrastructure development and maintenance costs with developers, or match TOD funds during the predevelopment stage. In addition, public agencies could take actions to minimize soft development costs by streamlining or expediting the environmental review and entitlement process as described above, reducing time delays, and increasing budget and contract certainties. For instance, use a multiple-year contract with provisions to allow contract amendments and end-of-year funding and contract rollovers. Designate full-time personnel to manage, monitor, and maintain TOD contracts,

⁵³ The Los Angeles County Metropolitan Transportation Authority. Modified 24 June 2013. *Joint Development Program*. Available at: http://www.metro.net/projects/joint_dev_pgm/

budgets, accounting, purchase orders, and schedules. To the public (government), selected TOD developers offer market and financing experiences and a secured, appropriate, and money-making use for the property.

TOD Governance

TOD governance is another important factor in the TOD planning and implementation process. Relevant to the innovative partnerships, good TOD governance requires local responsible agencies to take a direct and proactive role in coordinating TOD efforts. One simple way to streamline the environmental review and entitlement process is to provide all necessary and updated information and forms at one place online. This one-stop shop for all TOD information will reduce research time, increase TOD planning and decision-making transparency, and promote streamlining.

Another aspect of TOD governance is about civic personalities and governments' approach towards TOD. Some local governments take on a more proactive role in TOD planning while others show great dependence on guiding private sector investment through statutory instruments. "One style is to get it done fast. Others prefer to take several years. Some are stable. Others change mayors, directors and senior staff several times during the process. One wants to wait until regional, state and federal policies are finalized. Others prefer to lead rather than follow. Some innovate through applications for development. Others want development to stop until they revise their plans and codes. Some want visibility, others prefer the stealth approach. None of this is right or wrong, just different." Recognizing and working with different civic personalities at a particular community may help set realistic expectations and TOD work plans.

TOD Marketing and Education

Like any products, TOD is a product that needs to be branded, packaged, and marketed to the public. The public encompasses a large number of stakeholders, including, but not limited to, government agencies, residents, property owners, businesses, developers, investors, financial institutions, consultants, community organizations or special interest groups, and NGOs. The TOD marketing and education efforts to these stakeholders are more than public outreach and participation in the TOD planning. It is about promoting the TOD concept and raising awareness of TOD opportunities in areas suitable for such developments. It is also about providing technical assistance through, for instance, publication of TOD guidance documents and dissemination of information on TOD. Using the City of Pasadena again as an example, Mayor Bill Bogaard promoted two of the City's TOD projects, the Del Mar Station TOD project and the Sierra Madre Villa TOD project, in an interview in the April, 2007 issue of Urban Land, a monthly magazine of the Urban Land Institute. ⁵⁵

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⁵⁴ Transit Oriented Development Advocate. Accessed 25 June 2013. *TOD Lessons Learned, Portland, Oregon. What's TOD Got To Do With It?* Available at: http://www.todadvocate.com/todlessons.htm

⁵⁵ The City of Pasadena. April 2007. *The Green Quotient – Q&A with Bill Bogaard: Urban Land, Interview with Mayor Bill Bogaard*. Available at: http://www.ci.pasadena.ca.us/EkContent.aspx?theme=Black&id=3216&bid=0

Promote public interests in TOD through implementation of TOD marketing and education strategies. This sometimes requires hiring a consultant team to develop, design, and manage such strategies. Use marketing materials in the public campaigns for TOD. They may include TOD market and economic analyses, TOD opportunity sites, profiles, maps, 3D visual presentations, case studies, brochures, handbooks, fact sheets, newsletters, and newspaper articles. Utilize all feasible and available means to disseminate these materials. For instance, hold focus groups meetings, workshops, seminars, conferences, lecture series, tours, field trips, sketch walks, computer simulations, social media, and television or radio shows. Incorporate TOD marketing and education strategies in the planning documents or public outreach and participation plan, if available. Hence, the place-making philosophy can become a place-marking reality – marking a TOD as a place through TOD branding, packing, and marketing.

When advocating for a high quality transit station area plan, the following steps have been suggested.⁵⁶

- 1. Set goals for the transit station area plan
- 2. Educate and organize the base
- 3. Find a champion
- 4. Engage with government staff to influence process
- 5. Understand the process
- 6. Build alliances and partnerships for good planning
- 7. Contact the media at key milestones during the campaign
- 8. Shape the plan through community meetings
- 9. Review and respond to analyses and drafts of the plan
- 10. Manage opposition by staying in close contact with Council members and participating in community meetings
- 11. Implementation and continuous monitoring after adoption during

Community Engagement and Support Through Education

Community support is critical to deciding TOD success. While there is literature on many aspects of TOD in the areas of public policy, design, and financing, few studies focus on how to build community support for TOD. Perhaps the most difficult challenge in the TOD process is addressing community resistance from the very community in which a TOD will be located and is designed to benefit.

Advocating for a viable TOD requires public agencies and private parties to work with people who live and work in the community. When a TOD is planned in a community, residents are concerned about things such as safety, noise, fumes, litter, traffic, and parking. To overcome community resistance, a variety of efforts may be undertaken: uncovering communities' real concerns through

⁵⁶ Great Communities Collaborative. October 2009. *Great Communities Toolkit*. Available at: http://www.greatcommunities.org/toolkit/

formal and informal, ongoing, and constructive dialogs; forming a public-and-public partnership; employing public outreach, participation, and involvement program; and implement TOD marketing and education strategies. Other strategies that can be used to facilitate meaningful community engagement in the TOD planning and decision-making process include: 1) conducting multilingual outreach; 2) making periodic community assessments; and 3) holding community planning and visioning workshops.⁵⁷

The public involvement plan implemented by Charlotte, North Carolina when alternative transit options were being explored for Charlotte's South Corridor was a successful example.⁵⁸ "During each phase of the Major Investment Study, residents and stakeholders were educated about the transit opportunities and challenges in the corridors, and their input were gathered to identify community needs, issues, and concerns."⁵⁹

Seattle's Station Area Planning Program is another successful example of overcoming community resistance through education. This program included a community outreach subprogram, and the outreach efforts covered all interested citizens in the station areas. In the station area planning process, a number of station area advisory committees were established for each proposed light rail station.⁶⁰

The Great Communities Collaborative in the San Francisco Bay Area is a group of organizations dedicated to connecting local residents and businesses with tools and resources to influence transit development decision-making⁶¹. The Great Communities Toolkit, also available in Spanish and Chinese, outlines strategies on how to develop a station area plan campaign and how to manage and take advantage of the media.⁶²

In the SCAG region, Metro has recently incorporated a community and neighborhood outreach component during the design and conceptual development stage for its TOD projects in East Los Angeles. ⁶³ This effort is helping Metro identify, understand, and incorporate the needs of the community and neighborhood in which TOD will be located. For instance, on December 6, 2012,

⁵⁷ United States Environmental Protection Agency, Office of Sustainable Communities, Office of Environmental Justice. February 2013. *Creating Equitable, Healthy, and Sustainable Communities: Strategies for Advancing Smart Growth, Environmental Justice, and Equitable Development*. Available at:

http://www.epa.gov/smartgrowth/pdf/equitable-dev/equitable-development-report-508-011713b.pdf ⁵⁸ Goodwill and Hendricks. November 2002. *Building Transit Oriented Development in Established Communities*. Page 25. Center for Urban Transportation Research. Tampa, Florida. ⁵⁹ Ibid.

⁶⁰ Ibid.

⁶¹ Great Communities Collaborative. Accessed 25 June 2013. Available at: http://www.greatcommunities.org/

⁶² Great Communities Collaborative. October 2009. *Great Communities Toolkit*. Available at: http://www.greatcommunities.org/toolkit/

⁶³ Los Angeles County Metropolitan Transportation Authority. 6 December 2012. *Eastside Transit Oriented Development: Community Update*. Available at:

 $http://www.metro.net/projects_studies/joint_development/images/eastside_update_2012_1206.pdf$

Metro conducted a TOD community meeting in Boyle Heights at the Boyle Heights Senior Center. Videos of this meeting are viewable online. 64



⁶⁴ East Side Metro Transit Oriented Development Community Meeting in Boyle Height. Published 18 December 2012. Available at: http://www.youtube.com/watch?v=fkMF5g9lUmg http://www.youtube.com/watch?v=xz5KOlcuyh8

ATTACHMENT 7

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- **U.S. Environmental Protection Agency:** 'The Transportation & Environmental Impacts of Infill Versus Greenfield Development: A Comparative Case Study Analysis', October, 1999.
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- **U.S. Environmental Protection Agency:** 'Residential Construction Trends in America's Metropolitan Regions', Office of Sustainable Communities, Smart Growth Program, December 2012.
- **U.S. Environmental Protection Agency:** 'Smart Growth: A Guide to Developing & Implementing Greenhouse Gas Reductions Programs', Local Government Climate & Energy Strategy Series, 2011.
- **U.S. Environmental Protection Agency:** 'Smart Growth Index, Version 2.0 Indicator Dictionary', October 2002.

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Urban Institute: 'Can Federal Efforts Advance Federal & Local De-Siloing? Lessons from the HUD-EPA-DOT Partnership for Sustainable Communities', April 2013.

Urban Land Institute: 'Americans' Views on their Communities, Housing, & Transportation', March 2013.

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Western Riverside Council of Governments: 'Bus Rapid Transit Route Vision'. http://compassblueprint.org/project/wrcogbrt

DATE: June 5, 2014

TO: Community, Economic and Human Development (CEHD) Committee

Energy and Environment Committee (EEC)

FROM: Ping Chang, Program Manager, <u>chang@scag.ca.gov</u>, 213-236-1839

SUBJECT: California Environmental Protection Agency (Cal/EPA) California Communities

Environmental Health Screening (CalEnviroScreen Tool Draft Version 2.0)

EXECUTIVE DIRECTOR'S APPROVAL: Hosas Wehath

RECOMMENDED ACTION:

For Information Only – No Action Required.

EXECUTIVE SUMMARY:

The California Communities Environmental Health Screening (CalEnviroScreen), developed by the Cal/EPA, is a screening tool to identify California communities that are disproportionately burdened by multiple sources of pollution. Pursuant to SB 535, CalEnviroScreen is expected to be used to focus a portion of the state's Cap-and-Trade auction proceeds to the most impacted communities. CalEnviroScreen Tool Version 1.0 was first released in April 2013 with a minor update (Version 1.1) in September 2013. On April 21, 2014, Cal/EPA released for public comments the Draft CalEnviroScreen Version 2.0, which included the additional indicators of drinking water quality and unemployment rate, and used census tracts instead of zip codes as the basic geographic unit. As with the previous versions, CalEnviroScreen is not intended to be a substitute for focused risk assessment for a specific area or site, nor will the results of the tool be used for California Environmental Quality Act (CEQA) purposes.

STRATEGIC PLAN:

This item supports Strategic Plan Goal 2. Obtain Regional Transportation Infrastructure Funding and Promote Legislative Solutions for Regional Planning Priorities. a. Develop, monitor, or support state legislation that promotes increased investment in transportation programs in Southern California.

BACKGROUND:

CalEnviroScreen presents a screening methodology to identify California communities that are disproportionately burdened by multiple sources of pollution and presents the statewide results of the analysis using the screening tool. CalEnviroScreen uses existing environmental, health, and socioeconomic data to consider the extent to which communities across the state are burdened by and vulnerable to pollution. The results generated by CalEnviroScreen represent the confluence of numerous environmental, economic, social, and health related factors.

Cal/EPA expects the tool to enable state decision makers to focus their time, resources, and programs on those portions of the state that are in greater need of assistance due to their higher environmental burdens and greater vulnerability to, or reduced ability to withstand, these burdens as compared to other areas. Specifically, CalEnviroScreen will inform Cal/EPA's



implementation of the mandate to identify communities per SB 535 for the purposes of targeted investment of a portion of California Cap-and-Trade auction proceeds. Specifically, SB 535 requires that at least 25% of the Cap-and-Trade auction proceeds will benefit the "disadvantaged communities", while at least 10% of Cap-and-Trade auction proceeds will be used for investment within the "disadvantaged communities". As set forth in a guidance document prepared by Cal/EPA and discussed in stakeholder meetings, the tool is not intended to be a substitute for focused risk assessment for a specific area or site, nor will the results of the tool be used for CEQA purposes.

SCAG held a Cal/EPA workshop on December 12, 2012 in cooperation with other interested stakeholders intended to offer businesses, local governments and other stakeholders the opportunity to receive relevant information and provide input to Cal/EPA on the draft CalEnviroScreen tool. As follow up a Cal/EPA workshop was held at SCAG on February 5, 2013 to provide an overview of the second draft of CalEnviroScreen. CalEnviroScreen Tool Version 1.0 was released in April 2013 with a minor update (Version 1.1) released in September 2013 to remove the race/ethnicity factor. On April 21, 2014, Draft CalEnviroScreen Tool Version 2.0 ("Draft Version 2.0") was released by Cal/EPA.

Overall Methodology and Draft Version 2.0 Enhancement

The overall methodology of the CalEnviroScreen includes the following:

- 1. Identify indicators for the pollution burden component (including exposure and environmental effects indicators) and population characteristics component (including sensitive population and socioeconomic indicators).
- 2. Find sources of data to support indicator development.
- 3. Select and develop indicators, assigning a value for each geographic unit.
- 4. Assign a percentile for each indicator for each geographic unit, based on the rank-order of the value.
- 5. Generate maps to visualize data.
- 6. Derive scores for pollution burden and population characteristics components.
- 7. Derive the overall CalEnviroScreen score by combining the component scores.
- 8. Generate maps to visualize overall results.

Draft Version 2.0 uses the same overall methodology outlined above as Version 1.1 except for adding the indicators of drinking water quality and unemployment rate, and use of census tracts rather than ZIP codes as the geographic unit. Drinking water is an important potential pathway for exposure to chemical and bacterial contaminants. Unemployment has been associated with poor health outcomes and psychosocial stress in communities. The use of census tracts may allow for a more precise screening of pollution burdens and vulnerabilities in communities. In addition, Draft Version 2.0 includes scoring refinements such as emphasizing hazards that are closer to where people live. Finally, many data sets have been updated with more recent data. Attachment 1 includes a summary of major changes in Draft Version 2.0 from version 1.1.

Overall, with the improved methodology, Draft Version 2.0 will be able to better reflect the combined environmental impacts from multiple sources for California's communities at the census tract level. In addition, the updated data for environmental and socioeconomic indicators at the census tract level will also be valuable for various planning efforts.



Regional and County Results based on Draft Version 2.0

The Table below compares the population in the most impacted communities, or "disadvantaged communities" under CalEnviroScreen Versions 1.1 and 2.0.

County	*CalEnviroScreen 1.1 Scores Highest 10% Zip Codes Population	*CalEnviroScreen 2.0 Scores Highest 20% Census Tracts Population
Imperial	76,590	38,789
Los Angeles	3,624,533	3,724,776
Orange	271,217	269,189
Riverside	335,365	329,420
San Bernardino	640,344	679,260
Ventura	165,741	16,859
SCAG Region	5,113,790	5,058,293
California	7,695,915	7,457,988
SCAG Region Share of the State	66.4%	67.8%

*For the CalEnviroScreen Version 1.1, the "disadvantaged communities" were defined as the top 10% of the zip codes with the highest scores. Since Draft Version 2.0 uses the much smaller census tract as the geographical unit, the definition of "disadvantaged communities" is expected to be represented by the top 20% census tracts with the highest scores, as they include the similar level of population as the top 10% of zip codes with the highest scores under Version 1.1.

For the SCAG region as a whole, the *share* of state's population in the most impacted communities increased slightly from 66.4% using Version 1.1, to 67.8% using Draft Version 2.0. However, within the region, population in the most impacted communities in Los Angeles County increased by just over 100,000, and by almost 40,000 in San Bernardino County; while the impacted population decreased in the other four counties. Specifically, in Ventura County, population in the most impacted communities decreased significantly from 165,741 using Version 1.1, to 16,859 using Draft Version 2.0.

In collaboration with Cal/EPA, SCAG hosted a CalEnviroScreen Workshop on May 12, 2014 at SCAG main office with videoconference available from SCAG Regional Offices. At the workshop, Cal/EPA's Assistant Secretary and Director of the Office of Environmental Health Hazard Assessment presented the CalEnviroScreen Tool 2.0 update, received input, and responded to questions.



Further information about the Draft CalEnviroScreen Tool 2.0 including the Draft Report and an interactive mapping tool can be viewed at http://oehha.ca.gov/ej/ces2.html. Comments on the Draft CalEnviroScreen 2.0 were due June 1, 2014. Staff plans to apprise the CEHD Committee and EEC regarding the status of Version 2.0 in a future report.

FISCAL IMPACT:

Work associated with this item is included in the current FY 2013/14 Overall Work Program (080.SCG00153.04).

ATTACHMENTS:

- 1. Summary of Major Changes between CalEnviroScreen Versions 1.1 and 2.0
- 2. Regional and County Maps Showing Areas of the Most Impacted Communities using CalEnviroScreen Versions 1.1 and 2.0



Major Changes of CalEnviroScreen 2.0

CalEnviroScreen 2.0 updates the Version 1.1 screening tool in a number of important ways. The major changes in this proposed version are described briefly below. Additional detail is available in the Method description for each individual indicator in the revised draft report for CalEnviroScreen 2.0.

Census Tract Scale Analysis

CalEnviroScreen 2.0 results have been analyzed at the census tract scale. The previous Version 1.1 was analyzed at the ZIP code scale. California is comprised of approximately 8,000 census tracts, compared to approximately 1,800 ZIP codes. This scale of analysis represents a finer level of resolution for many parts of the state. The Method section for each indicator has been updated to reflect how each indicator's score is calculated at this scale.

New Indicator: Drinking Water Quality

Drinking water is an important potential pathway for exposure to chemical and bacterial contaminants. Here, a measure of drinking water quality across California has been added to the screening tool which takes into account the number, concentration, and relative toxicity of contaminants.

New Indicator: Unemployment Rate

Unemployment has been associated with poor health outcomes and psychosocial stress in communities. An indicator using the 5-year estimate of the unemployment rate (2008-2012) has been included as a Socioeconomic Factor in CalEnviroScreen 2.0.

Proximity Adjustment for Environmental Effects Indicators

The scoring for many of the Environmental Effects indicators in CalEnviroScreen has been adjusted to emphasize hazards that are closer to where people live. Census tracts are made up of numerous census blocks, some of which are populated and others that are unpopulated. Hazards that are located further than certain specific distances from any populated census block within a tract were either reduced in scoring weight based on the distance or eliminated from the scoring for that census tract. How these adjustments were applied for each Environmental Effects indicator is described in the indicator's Method section.



Groundwater Threats: Revised Weighting

Rate of Low Birth Weight Infants: Data Modeling

Hazardous Waste Facilities and Generators

Increased Use of Data on Hazards on Tribal Land

Ozone: Data Modeling

Updated Datasets

Source: Cal/EPA

Different types of sites that are included in the Groundwater Threats indicator are weighted differently based on site type and status. The weighting scheme has been revised in CalEnviroScreen 2.0 to reflect the relative levels of hazard that are potentially present at the site.

Many estimates of the rate of low birth weight infants for census tracts can be unreliable because of the relatively low number of births that occur in an area that size. Spatial modeling was used for the estimation of the low birth weight rates in CalEnviroScreen 2.0 to calculate more reliable estimates, especially in census tracts with fewer people.

Additional weight has been applied to permitted hazardous waste facilities with older permits reflecting concerns that these may not reflect current conditions.

Hazardous waste generator data have also been limited to large-volume generators with some hazardous waste in Version 2.0.

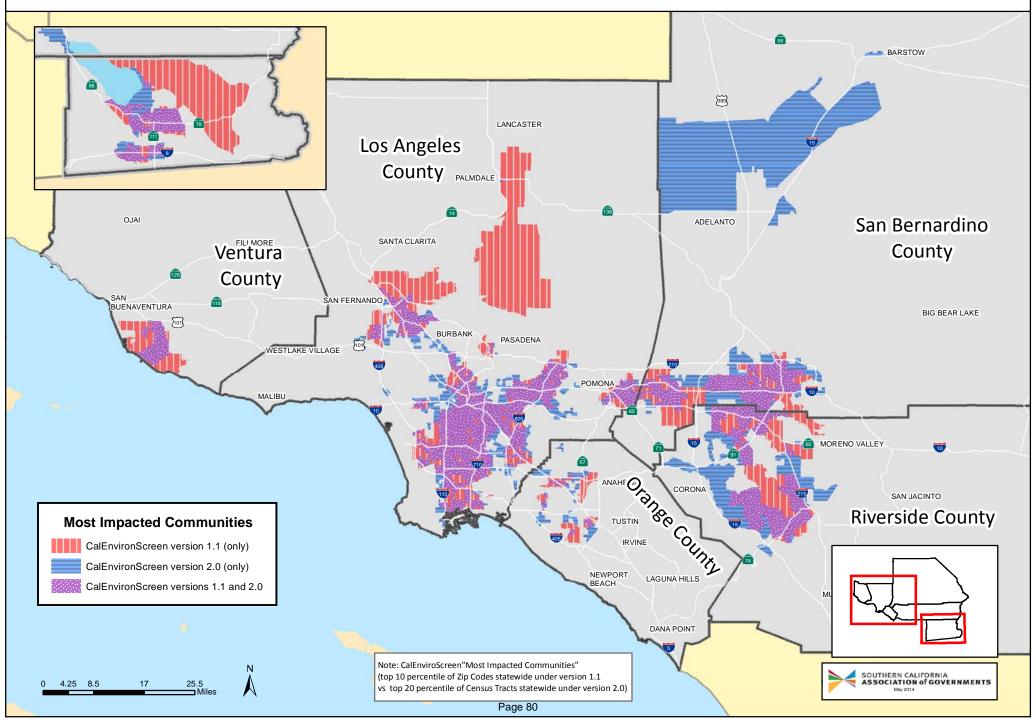
Additional data on certain types of environmental hazards that are present on tribal land but not included in CalEnviroScreen 1.1 were obtained from the US Environmental Protection Agency. The data for these sites/facilities was integrated into the appropriate indicator for the CalEnviroScreen 2.0.

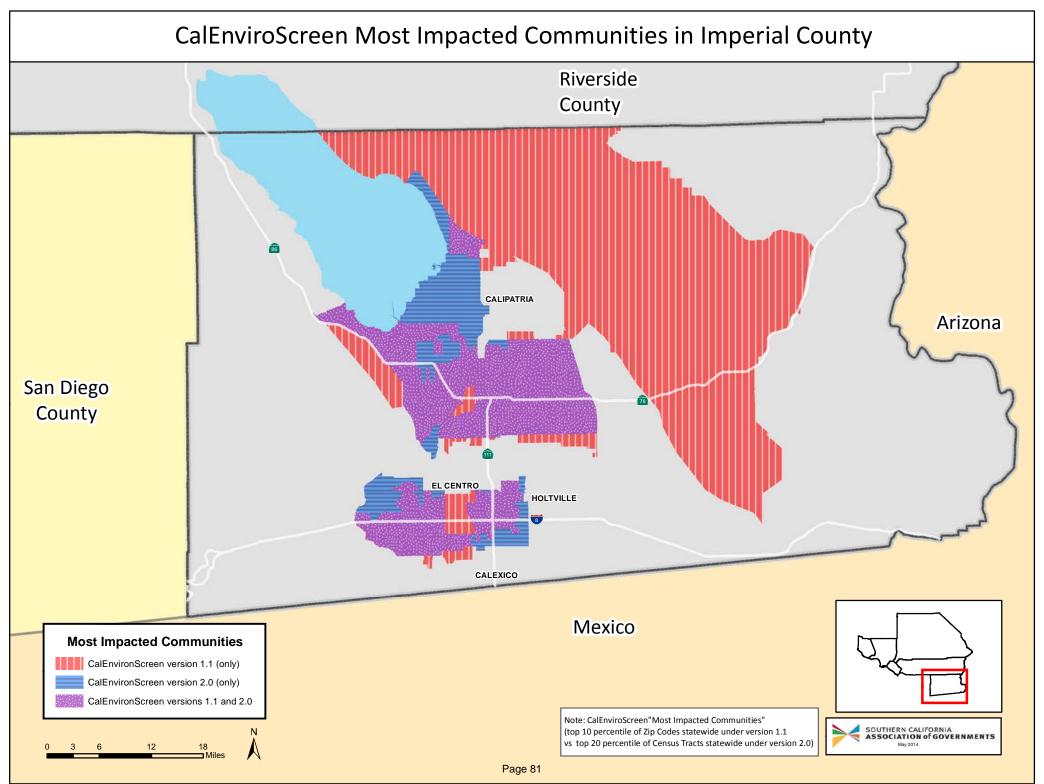
CalEnviroScreen 2.0 uses the portion of the daily maximum 8-hour ozone concentration over the state 8-hour standard (0.070 ppm), averaged over three years, 2009 to 2011. Version 1.1 used the federal 8-hour standard (0.075 ppm) for this calculation.

Many data sets in the CalEnviroScreen 2.0 have been updated with more recent data. These include the indicators for Ozone, PM2.5, Pesticide Use, Cleanup Sites, Hazardous Waste, Solid Waste, Groundwater Threats, Impaired Water Bodies, Linguistic Isolation, Educational Attainment, and Poverty.

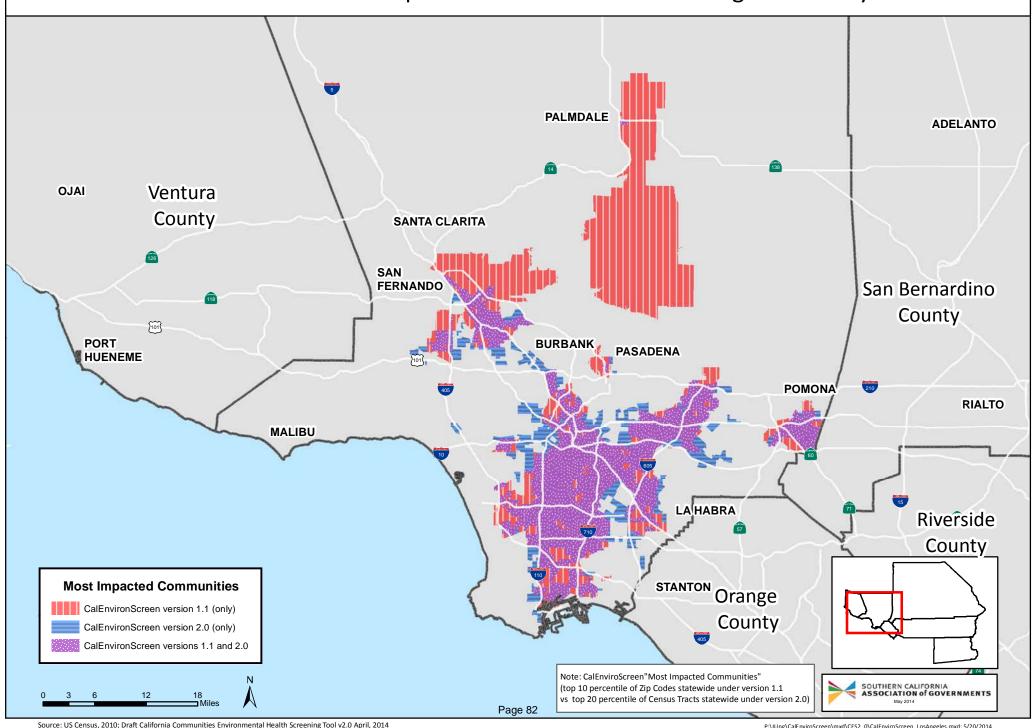


CalEnviroScreen Most Impacted Communities in the SCAG Region

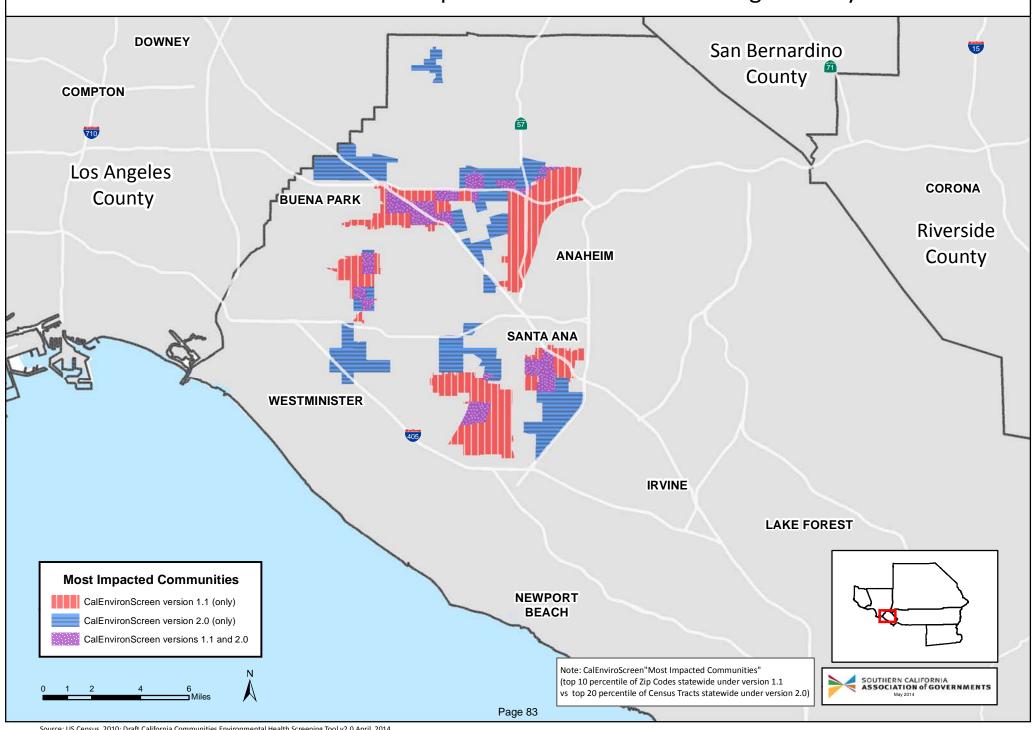




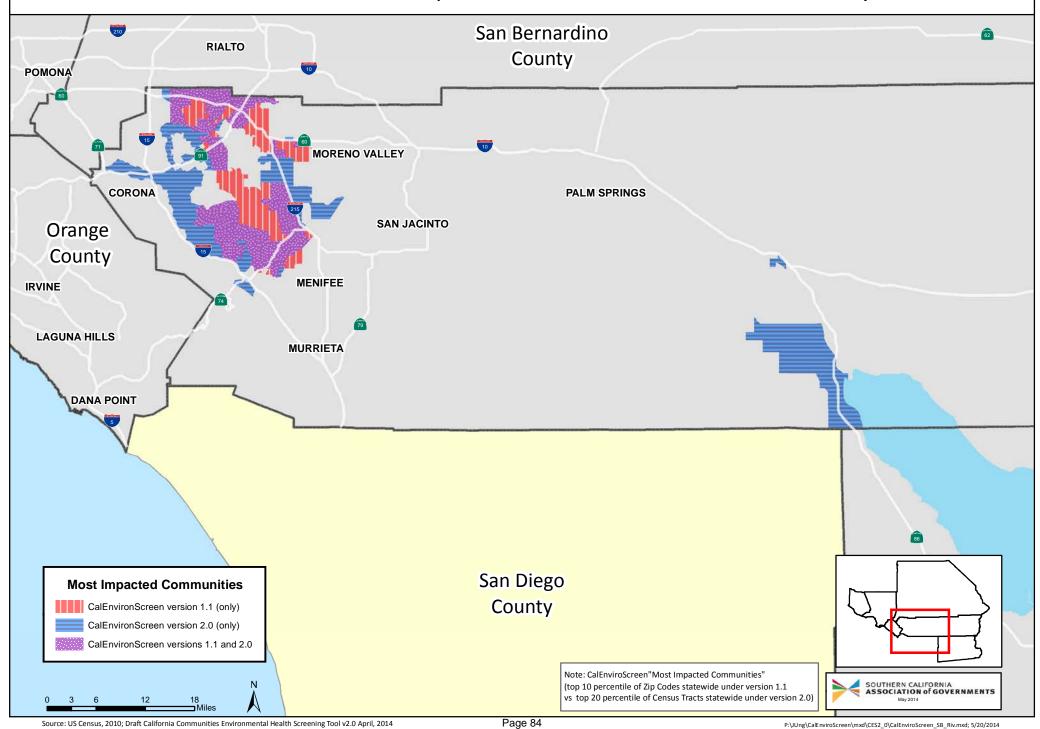
CalEnviroScreen Most Impacted Communities in Los Angeles County



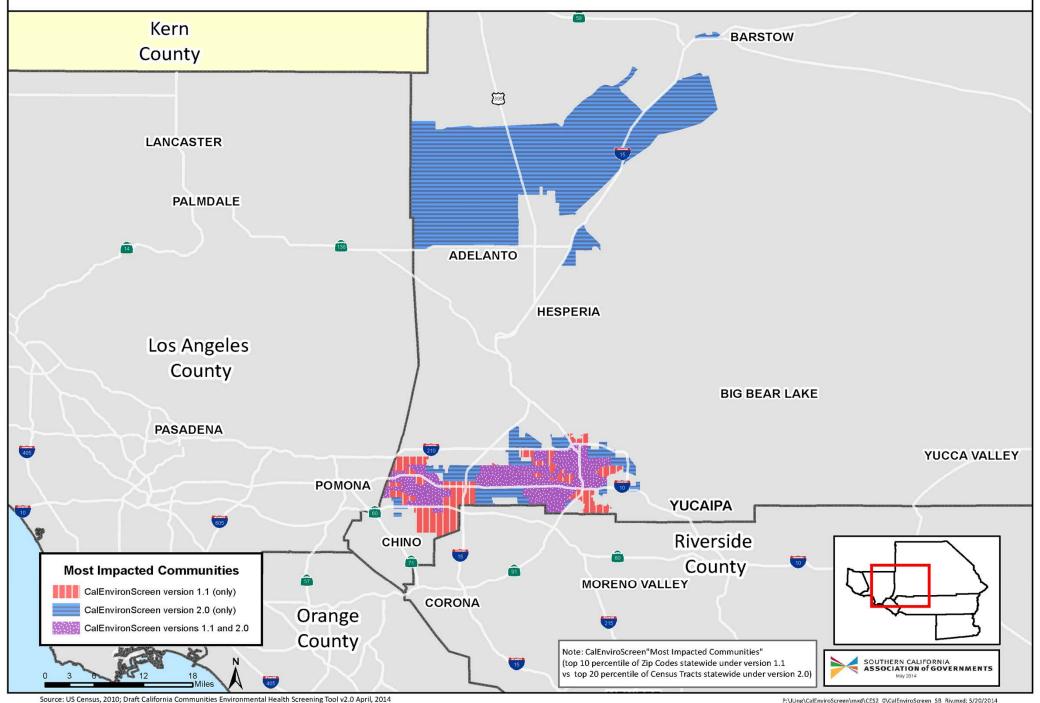
CalEnviroScreen Most Impacted Communities in Orange County



CalEnviroScreen Most Impacted Communities in Riverside County

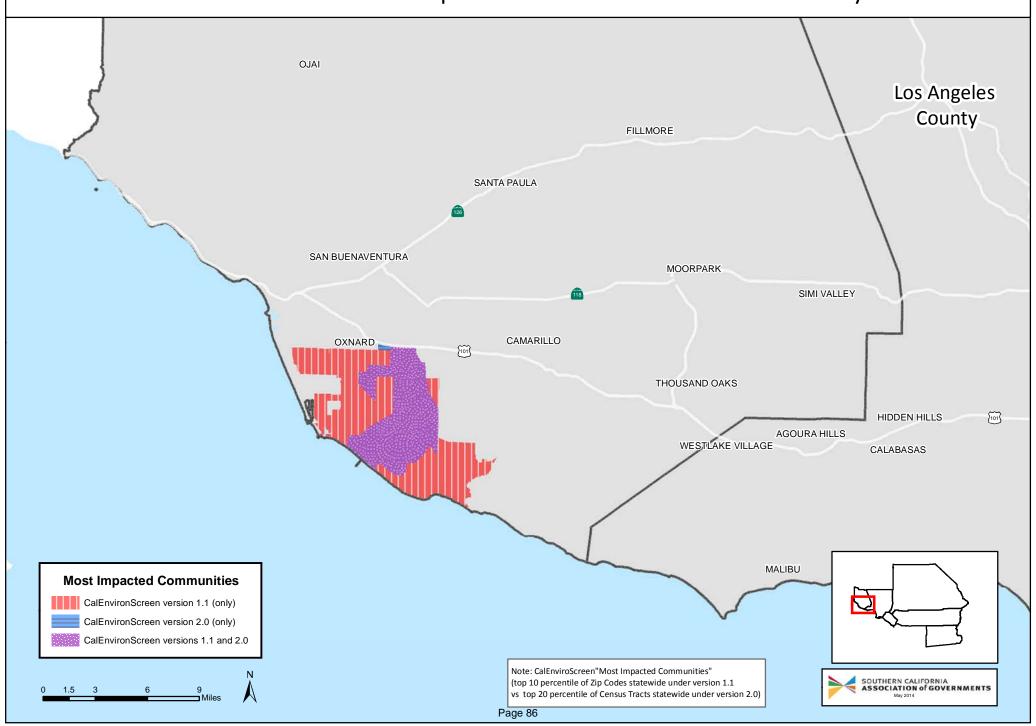


CalEnviroScreen Most Impacted Communities in San Bernardino County



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CalEnviroScreen Most Impacted Communities in Ventura County







DATE: June 5, 2014

TO: Community, Economic and Human Development (CEHD) Committee

FROM: Simon Choi, Chief of Research and Forecasting; 213-236-1849; choi@scag.ca.gov

SUBJECT: Program for 25th Annual SCAG/USC Demographic Workshop - June 9, 2014

EXECUTIVE DIRECTOR'S APPROVAL: Horas Wehath

RECOMMENDED ACTION:

For Information Only – No Action Required.

EXECUTIVE SUMMARY:

SCAG staff will provide an overview of the program for the 25th Annual Demographic Workshop with the University of Southern California (USC) on June 9, 2014 at the USC Davidson Conference Center.

STRATEGIC PLAN:

This item supports SCAG's Strategic Plan; Goal 4: Develop, Maintain and Promote the Utilization of State of the Art Models, Information Systems and Communication Technologies; Objective b: Develop, maintain and enhance data and information to support planning and decision making in a timely and effective manner.

BACKGROUND:

As a follow up to SCAG's 2013 Economic Summit, on June 9, 2014, SCAG and USC will host the 25th Annual Demographic workshop. This year's workshop program was developed under the main theme, "*Demographics of Poverty and Progress after the Recession*." The poverty discussion will address what has changed after the recession, or what is the new "normal" poverty trend.

The first panel will feature new methods for calculating poverty by Dr. Sarah Bohn, Research Fellow for Public Policy Institute for California (PPIC), and Dr. Dowell Myers, Professor of Policy, Planning, and Demography for Sol Price School of Public Policy at the University of Southern California. The actual trends in poverty after the recession are quite alarming in some respects, but there are also some hopeful signs. The second panel features the poverty concentration in the Inland Empire and possible solutions by Dr. John Husing, Chief Economist of Inland Empire Economic Partnership.

The Workshop will also feature new population projections by the Demographic Research Unit of the California Department of Finance (DOF), as well as the USC projection for Los Angeles County of new generational futures. Afternoon roundtables will provide participants with new information about diverse demographic topics: American Community Survey of the US Census Bureau; Data Resources of the DOF Demographic Research Unit; Migration of Population Forecasts; School Forecasting and Operations; Income Inequality Trends from a Regional Housing Policy Standpoint; Birth Trends in Los Angeles County; and Potential Health Impacts.

RC Members are invited to participate and may register for the Workshop at the following website: http://www.scag.ca.gov/calendar/Pages/DemographicWorkshop.aspx

FISCAL IMPACT:

Work associated with this item is included in the current FY 2013-14 Budget under 800.SCG00160.04

ATTACHMENT:

Program for 25th Annual SCAG/USC Demographic Workshop, June 9, 2014.



25th Annual Demographic Workshop (June 9th, 2014): Demographics of Poverty and Progress After the Recession,

Monday, June 9, 2014

AGENDA

AM	8:00 8.15	Registration/Continental Breakfast Welcome/Introductions
	6.13	Jack Knott, Dean, Sol Price School of Public Policy, USC
	8:30	Hasan Ikhrata, Executive Director, Southern California Association of Governments James T. Christy, Regional Director, Los Angeles Regional Office, U.S. Census Bureau Panel 1: Population Projections – New Approaches
	6.50	Dowell Myers (Moderator), Director of the Population Dynamics Research Group, Sol Price School of Public Policy, USC
	9:20	Walter Schwarm, Demographic Research Unit, California Department of Finance Panel 2: Trends in Poverty and Innovation in Measuring Poverty
	9.20	Frank Wen, Manager of Research & Analysis, Southern California Association of
		Governments
		Dowell Myers (moderator), Director of the Population Dynamics Research Group, Sol Price School of Public Policy, USC
		Sarah Bohn, Research Fellow, Public Policy Institute of California
	10:30	Coffee Break
	10:45	Panel 3: Poverty Concentrations and Solutions
		John Husing, Vice-President, Economics & Politics, Inc.
		Manuel Pastor, Professor, USC (invited)
PM	12:00	Working Lunch (stay in the hall)
	12:15	Luncheon Keynote Speech
	4 00	Raphael Bostic, Professor, Sol Price School of Public Policy, USC
	1:00	Greetings A the State Company of the state
	1:10	Jonathan Buttle, State Census Data Center, California Department of Finance Afternoon Roundtables
	1.10	Table 1 – Exploring American Community Survey (Jerry Wong)
		Table 2 – Data Resources of the DOF Demographic Research Unit (Jonathan Buttle)
		Table 3 – Estimating Migration for Population Forecasts (John Pitkin)
		Table 4- School Forecasting and Operations (Valerie Edwards & Mary Ehrenthal
		Prichard)
		Table 5 – Income Inequality Trends from a Regional Housing Policy Standpoint (Joe Carerras)
		Table 6 – Birth Trends in Los Angeles County and Potential Health Impacts (Louise
		Rollin-Alamillo)
	2:30	Takeaways of Roundtables, Questions & Answers
	3:15	Concluding Remarks

DATE: June 5, 2014

TO: Community, Economic and Human Development (CEHD) Committee

Energy and Environment Committee (EEC)

Transportation Committee (TC)

Regional Council (RC)

FROM: Kimberly Clark, Senior Regional Planner, Land Use and Environmental Planning,

213-236-1844, clark@scag.ca.gov

SUBJECT: Progress of One-on-One Meetings with Local Jurisdictions to Provide Assistance for a

Bottom-up Local Input Process

EXECUTIVE DIRECTOR'S APPROVAL: Heras Wehath

RECOMMENDED ACTION:

For Information Only – No Action Required.

EXECUTIVE SUMMARY:

SCAG staff continues with its past practice of engaging in a bottom-up local input process for the 2016-2040 Regional Transportation Plan and Sustainable Communities Strategy ("2016 RTP/SCS" or "Plan"), which employs a "local control - regional collaboration" strategy for the Plan update. To facilitate and assist in the local review of the draft socioeconomic and geographic datasets for the 2016 RTP/SCS, staff has conducted meetings with jurisdictions one-on-one to collect data changes, answer questions, and provide technical guidance, as needed. To date, staff has requested sessions with all 197 jurisdictions, and has completed meetings with 183 jurisdictions, or 93% of all cities and counties in the SCAG region. This effort has resulted in feedback from 63% of jurisdictions on all or a portion of SCAG's information requests in the current round of the Local Input Process (Round 2).

STRATEGIC PLAN:

This item supports SCAG's Strategic Plan; Goal 1: Improve Regional Decision Making by Providing Leadership and Consensus Building on Key Plans and Policies; Objective a: Create and facilitate a collaborative and cooperative environment to produce forward thinking regional plans.

BACKGROUND:

At the October 3, 2013 CEHD meeting, staff presented the sample package for local input on SCAG's growth forecast and land use datasets for the 2016 RTP/SCS. Starting in November, all 197 local jurisdictions in the SCAG region were contacted and requested to provide input on their current and anticipated population, households, and employment figures for 2012, 2020, 2035, and 2040. This is in accordance with Stage 2 of the Bottom-up Local Input Process ("local control – regional collaboration") for the 2016 RTP/SCS, as outlined in previous communication with local jurisdictions:

- Stage 1 Preliminary General Plan, Zoning, Existing Land Use, and Resource Data Collection and Review (March 2013 September 13, 2013)
- Stage 2 Review of Base Year 2012 Socioeconomic Data and Future Years' (2020, 2035, and 2040) Growth Forecast, and Local Survey (November 2013 May 2014); and
- Stage 3 Land Use Scenario Planning Exercises (May 2014 September 2014)



In order to facilitate the review of this data and to ensure that each jurisdiction is fully informed of the 2016 RTP/SCS planning process, SCAG staff has regularly conducted presentations for planning directors at subregional events and have met individually with local jurisdictions to collect data, answer questions, and provide technical assistance.

With the assistance of the region's 15 subregional organizations, presentations have been made at the Orange County Council of Governments (OCCOG) Technical Advisory Committee; South Bay Cities COG Livable Communities Working Group; the Ventura County City-County Planners' Association; the Coachella Valley Association of Governments Technical Planning Sub-Committee'; the Imperial County Transportation Commission Technical Advisory Panel; the San Bernardino Associated Governments (SANBAG) Planning Directors Meeting; the Western Riverside Council of Governments (WRCOG) Planning Directors Technical Advisory Committee; the WRCOG City Managers Technical Advisory Committee; the San Gabriel Valley Council of Governments Technical Advisory Panel; and the Meeting of the Gateway Cities Planning Directors.

Staff has also met with 93% of all local jurisdictions at this time, and has contacted all 197 jurisdictions to schedule sessions. The progress of SCAG's engagement to date with local jurisdictions is also shown below.



Percent of Jurisdictions Solicited for One-on-One Sessions: 100%

The deadline for providing input during Stage 2 of the Local Input Process was May 31st, 2014, and additional information on input received will be presented at SCAG's June 5th Regional Council and Policy Committee Meetings. Staff will continue to hold one-on-one sessions with the remaining local jurisdictions during the month of June to ensure that each city is fully informed of the 2016 RTP/SCS Local Input Process.

To ensure adequate resources are allocated, various departments within SCAG have been involved and Frank Wen, Manager, Research & Analysis Department, continues to serve as the main point of contact for this process. He can be reached at: 213-236-1854 or RTPLocalInput@scag.ca.gov.

FISCAL IMPACT:

Activities related to the 2016 RTP/SCS development are included in the FY14 OWP under 010.SCG0170.01, 020.SCG1635.01, 055.SCG0133.025, and 070.SCG0130.10.

ATTACHMENT:

None.



COMMUNITY, ECONOMIC & HUMAN DEVELOPMENT COMMITTEE of the SOUTHERN CALIFORNIA ASSOCIATION OF GOVERNMENTS

April 3, 2014 Minutes

THE FOLLOWING MINUTES ARE A SUMMARY OF ACTIONS TAKEN BY THE COMMUNITY, ECONOMIC & HUMAN DEVELOPMENT COMMITTEE. AN AUDIO RECORDING OF THE ACTUAL MEETING IS AVAILABLE FOR LISTENING.

The Community, Economic & Human Development Committee held its meeting at SCAG's downtown Los Angeles office.

Members Present

<u>Wembers Tresent</u>	
Hon. Don Campbell, Brawley	ICTC
Hon. Carol Chen, Cerritos	GCCOG
Hon. Steven Choi, City of Irvine	District 14
Hon. Lynne Dvorak, City of Laguna Woods	OCCOG
Hon. Rose Espinoza, City of La Habra	OCCOG
Hon. Margaret Finlay, Duarte (Chair)	District 35
Hon. Debbie Franklin, Banning	WRCOG
Hon. James Gazeley, Lomita	District 39
Hon. Michael Goodland, Jurupa Valley	WRCOG
Hon. Tom Hansen, City of Paramount	GCCOG
Hon. Steve Hofbauer, Palmdale	District 43
Hon. Bob Joe, South Pasadena	Arroyo Verdugo Cities
Hon. Paula Lantz, Pomona	District 38
Hon. Carl Morehouse, San Buenaventura	District 47
Hon. Ray Musser, Upland	SANBAG
Hon. John Nielsen, Tustin	District 17
Hon. Sonny Santa Ines, Bellflower	GCCOG
Hon. Becky Shevlin, Monrovia	SGVCOG
Hon. Frank Zerunyan, Rolling Hills Estates	SBCCOG
Hon. Michael Wilson, Indio	CVAG

Members Not Present

OCCOG
WSCCOG
OCCOG
SGVCOG
District 6
District 11
District 64

Hon. Charles Martin Morongo Band of Mission Indians

Hon. Larry McCallon, Highland District 7

Members Not Present (Cont'd)

Hon. Kathryn McCullough, Lake ForestDistrict 13Hon. Gene Murabito, GlendoraSGVCOGHon. Julie Hackbarth-McIntyre, BarstowSANBAGHon. Susan McSweeney, Westlake VillageLVMCOGHon. Ed Paget, NeedlesSANBAG

Hon. John Palinkas Pechanga Band of Luiseno Indians

Hon. Rex Parris, Lancaster

North Los Angeles County

Hon. Julio Rodriguez, Perris District 69
Hon. Tri Ta, Westminster District 20

Hon. Ray Torres Torres-Martinez Desert Cahuilla

Indians

CALL TO ORDER & PLEDGE OF ALLEGIANCE

Hon. Margaret Finlay, Chair, called the meeting to order at approximately 10:15 AM. Hon. Rose Espinoza led the Committee in the Pledge of Allegiance.

ELECTION OF CHAIR AND VICE-CHAIR

The Chair opened the election for Chair and Vice-Chair. Joe Silvey, General Counsel, stated that an advance call for nominations was made several weeks ago, and only the current Chair, Hon. Margaret Finlay, and the current Vice-Chair, Hon. Bill Jahn, expressed interest in running for the positions. Mr. Silvey stated that both are eligible to be elected to their positions for a second consecutive year. The Chair asked if there were other nominations from the floor for either Chair or Vice-Chair. Noting none, the Chair closed the nominations.

A MOTION was made (Hofbauer) to elect Hon. Margaret Finlay as Chair and Hon. Bill Jahn as Vice-Chair of the CEHD Committee. The MOTION was SECONDED (Morehouse) and UNANIMOUSLY APPROVED by the following vote:

AYES: Campbell, Chen, Choi, Dvorak, Espinoza, Finlay, Franklin, Gazeley, Goodland,

Hansen, Hofbauer, Joe, Lantz, Morehouse, Musser, Nielsen, Santa Ines, Shevlin,

Wilson, Zerunyan

NOES: None

ABSTAIN: None

PUBLIC COMMENT PERIOD

There were no public comments.

REVIEW AND PRIORITIZE AGENDA ITEMS

There was no reprioritization of the agenda.

INFORMATION ITEMS

1. <u>Economic Development Options for Local Jurisdictions in the Post-Redevelopment Agencies (RDA) Era</u>

Huasha Liu, Director of Land Use and Environmental Planning, introduced Larry Kosmont, CRE, President & CEO of Kosmont Companies. Mr. Kosmont presented options for

economic development in the post-RDA era, by identifying tools and strategies needed to get southern California back in the game of economic development. Mr. Kosmont stated that one of the most important strategies is to fix unemployment, which will put the state budget back to work. He further stated that creating new jobs will also increase spending, and California will reap the benefit when those wage earner dollars generate significant sales tax revenue. Mr. Kosmont emphasized the importance for local officials to stay the course and continue to play a leadership role in this post-RDA era.

2. <u>Progress of One-on-One Meetings with local Jurisdictions to provide Assistance for a Bottom-Up Local Input Process</u>

Kimberly Clark, Senior Regional Planner, provided an overview of the one-on-one meetings that have been scheduled with local jurisdictions to assist in the review of the draft socioeconomic and geographic datasets for the 2016 RTP/SCS. At these meetings, staff is collecting data changes, answering questions, and providing technical guidance. Ms. Clark reported that staff has met with 75% of the 197 jurisdictions in the SCAG region as of March 2014. The remaining 25% are being scheduled for upcoming sessions in the next several weeks. The first round of one-on-one meetings will be completed by the end of April 2014.

3. 25th Annual SCAG/USC Demographic Workshop- June 9, 2014
Dr. Simon Choi, Chief of Research and Forecasting, reported that SCAG will co-host the 25th Annual Demographic Workshop with the University of Southern California (USC) on June 9, 2014 at the USC Davidson Conference Center. The theme of the workshop is "Demographics of Poverty and Progress after the Recession."

CONSENT CALENDAR

Approval Item

4. Minutes of the February 6, 2014 Meeting

Receive and File

- 5. 2014 Regional Council and Policy Committees Meeting Schedule
- 6. SCAG Sustainability Planning Grants Program Monthly Update

A MOTION was made (Morehouse) to approve the Minutes of February 6, 2014. The MOTION was SECONDED (Chen) and UNANIMOUSLY APPROVED by the following vote:

AYES: Campbell, Chen, Choi, Dvorak, Espinoza, Finlay, Franklin, Gazeley, Goodland,

Hansen, Hofbauer, Joe, Lantz, Morehouse, Musser, Nielsen, Santa Ines, Shevlin,

Wilson, Zerunyan

NOES: None

ABSTAIN: None

A MOTION was made (Santa Ines) to approve Receive and File items #5 and #6. The MOTION was SECONDED (Morehouse) and UNANIMOUSLY APPROVED by the following vote:

AYES: Campbell, Chen, Choi, Dvorak, Espinoza, Finlay, Franklin, Gazeley, Goodland,

Hansen, Hofbauer, Joe, Lantz, Morehouse, Musser, Nielsen, Santa Ines, Shevlin,

Wilson, Zerunyan

NOES: None

ABSTAIN: None

CHAIR'S REPORT

The Chair provided an update on the RHNA Subcommittee meeting, which was held on March 13, 2014.

STAFF REPORT

Dr. Frank Wen, Manager of Research & Analysis, reminded everyone to make sure their 700 Forms are submitted to Lillian Harris-Neal. Dr. Wen encouraged the Committee members to register for the 2014 Regional Conference & General Assembly being held on May1-2, 2014 at the Renaissance Esmeralda Indian Wells Resort & Spa.

FUTURE AGENDA ITEMS

There were no future agenda items presented.

ANNOUNCEMENTS

There were no announcements presented.

ADJOURNMENT

The Chair adjourned the meeting at 12:00 PM.

Minutes Approved By:

Frank Wen, Manager Research & Analysis

Community, Economic & Human Development Committee Attendance Report X = County Represented X = Attended = No Meeting NM = New Member EA = Excused Absence Member (including Ex-Officio) May LastName, FirstName Representing 00 RC SB VC Jan Feb Mar Jun Jul Dec Apr Aug Sep Oct Χ OCCOG Allevato, Sam Campbell, Don* ICTC Х Χ Х Χ Χ Chen, Carol Gateway Cities X Х Χ Χ Χ Χ Х Choi, Steven City of Irvine (District 14) WSCCOG X Χ Cooper, Jeffrey OCCOG Χ NMDvorak, Lynne Χ X Espinoza, Rose OCCOG X Χ Duarte (District 35) Finlay, Margaret* (Chair) Χ X X Franklin, Debbie WRCOG X Χ X Χ Garcia, Ron OCCOG X X Gazeley, James* Lomita (District 39) X Χ X X Gonzales, Joseph J. SGVCOG X X Goodland, Michael WRCOG X Χ Hansen, Tom Gateway Cities Χ X X Harrison, Jon District 6 Χ Hofbauer, Steve Palmdale (District 43) X Χ Χ X Jahn, Bill* (Vice-Chair) SANBAG (District 11) X Χ X Joe, Robert Arroyo Verdugo X Χ X Χ District 64 Katapodis, Jim X Lantz, Paula* Pomona (District 38) X Χ X X Martin, Charles Morongo Indians Χ Χ McCallon, Larry* Highland (District 7) X X McCullough, Kathryn* OCCOG X Χ X Hackbarth-McIntyre, Julie SANBAG Las Virgenes/Malibu COG McSweeney, Susan Х Morehouse, Carl* VCOG (District 47) Χ X X Χ Murabito, Gene* SGVCOG X Musser, Ray SANBAG X Χ X X Nielsen, John* Tustin (District 17) X Χ Χ Paget, Ed SANBAG Χ X X Palinkas, John Pechanga Indians Χ Parris, Rex North L.A. County Subregion X Rodriguez, Julio District 69 GCCOG Santa Ines, Sonny X Χ X Shevlin, Becky SGVCOG X X X Ta, Tri* District 20 X X Torres, Ray Torres Martinez X X Wilson, Michael CVAG Χ X X SBCCOG X Χ X Χ Zerunyan, Frank Regional Council Member*



12:15 PM - 2:00 PM



2014 MEETING SCHEDULE

REGIONAL COUNCIL AND POLICY COMMITTEES

Main Office

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Officers

President Carl Morehouse, San Buenaventura

First Vice President Cheryl Viegas-Walker, El Centro

Second Vice President Michele Martinez, Santa Ana

Immediate Past President Greg Pettis, Cathedral City

Executive/Administration Committee Chair

Carl Morehouse, San Buenaventura

Policy Committee Chairs

Community, Economic and Human Development Margaret Finlay, Duarte

Energy & Environment Deborah Robertson, Rialto

Transportation Alan Wapner, San Bernardino Associated Governments

All Regular Meetings are scheduled on the
1 st Thursday of each month, except for September*

Executive/Administration Committee (EAC)

9:00 AM - 10:00 AM

Community, Economic and Human Development Committee (CEHD)

10:00 AM - 12:00 PM

Transportation Committee (TC)

10:00 AM - 12:00 PM

Regional Council (RC)

February 6, 2014

January 2, 2014

March 6, 2014

April 3, 2014

May 1 – 2, 2014 (SCAG 2014 Regional Conference & General Assembly)

June 5, 2014

DARK IN JULY

August 7, 2014

September 11, 2014*
(Note: League of California Cities Annual Conference in Los Angeles, Sept. 3 – 5)

October 2, 2014

November 6, 2014

December 4, 2014

The Regional Council consists of 86 elected officials representing 191 cities, six counties, six County Transportation Commissions, one representative Page 96 from the Transportation Corridor Agencies, one Tribal Government representative and one representative for the Air Districts within Southern California.



DATE: June 5, 2014

TO: Regional Council (RC)

Executive/Administration Committee (EAC)

Community, Economic, and Human Development (CEHD) Committee

Energy and Environment Committee (EEC)

Transportation Committee (TC)

FROM: Hasan Ikhrata, Executive Director, Ikhrata@scag.ca.gov, 213-236-1944

SUBJECT: SCAG Sustainability Planning Grants Program – Monthly Update

EXECUTIVE DIRECTOR'S APPROVAL: for Wehall

RECOMMENDED ACTION:

Receive and File.

EXECUTIVE SUMMARY:

SCAG is providing a monthly update (attached) regarding the successful implementation of the 73 Sustainability Grants to member agencies. Forty-four (44) of the seventy-three (73) SCAG-approved Sustainability Planning Grants were funded in the fall of 2013. At the time this report was distributed, forty-four (44) grant projects have had Scopes of Work developed and finalized; forty-two (42) grant projects have had Request for Proposals (RFPs) released; twenty-five (25) grant projects have selected consultants; and thirteen (13) grant projects have had contracts executed. SCAG staff intends to have all contracts executed by the end of the fiscal year.

STRATEGIC PLAN:

This item supports SCAG's Strategic Plan Goal 1: Improve Regional Decision Making by Providing Leadership and Consensus Building on Key Plans and Policies; and Goal 4: Develop, Maintain and Promote the Utilization of State of the Art Models, Information Systems and Communication Technologies.

BACKGROUND:

On September 12, 2013, the Regional Council approved seventy-three (73) Sustainability Planning Grant projects and directed staff to proceed with funding projects with available funds for Phases I and Phase II projects (total of 44 projects). The remaining projects will be part of Phase III and will proceed as additional funds become available in FY 2014-2015.

SCAG staff is providing monthly updates to the Board regarding implementation of the seventy-three (73) grants. At the time this report was distributed, forty-four (44) grant projects have had scopes of work developed in partnership with the cities, forty-two (42) grant projects have had RFPs released, twenty-five (25) grant projects have consultants selected and thirteen (13) grant projects have completed negotiations and have contracts executed. SCAG staff intends to have all contracts executed by the end of the fiscal year.

FISCAL IMPACT:

Funding is included in SCAG's FY 2013-14 Overall Work Program (OWP) Budget. Staff's work budget for the current fiscal year are included in FY 2013-14 OWP 065.SCG02663.02.

ATTACHMENT:

Summary Progress Chart



SCAG Sustainability Planning Grants May 6, 2014 Regional Council Progress Update

May 6, 2014

			Working /				
L.		Project	Last				
Rank	Applicant	Project	 Contact	Scope	RFP	Selection	Contract
	Phase 1 (Available fu						
1	San Bernardino County	Bloomington Area Valley Blvd. Specific Plan Health and Wellness Element - Public health; Active transportation; Livability; Open space	x	x	x	x	x
- 1	County	Van Nuys & Boyle Heights					
2	Los Angeles - Department of City Planning	Modified Parking Requirements - Economic development; TOD; Livability	x	x	x	x	x
3	Los Angeles - Department of City Planning	Bicycle Plan Performance Evaluation - Active transportation; performance measures	x	х	X	x	х
4	Western Riverside Council of Governments	Public Health: Implementing the Sustainability Framework - Public health; Multi-jurisdiction coordination; Sustainability	x	x	x	x	
5	Santa Ana	Complete Streets Plan - Complete streets; Active transportation; Livability	x	x	x	x	x
6	San Bernardino Associated Governments	Climate Action Plan Implementation Tools - GHG reduction; Multi- jurisdiction coordination; Implementation	x	x	x	x	x
7	Riverside	Restorative Growthprint Riverside - GHG reduction; Infrastructure investment; Economic development	X	x	x	x	x
8	Orange County Parks	Orange County Bicycle Loop - Active transportation; Multi-jurisdictional; Public health	x	x	x	x	x
	Ventura County	Connecting Newbury Park - Multi-Use Pathway Plan - Active transportation; Public health; Adaptive re- use	х	х	x	x	х
10	Imperial County Transportation Commission	Safe Routes to School Plan - Multi-modal; Active transportation	x	x			

			Working /				
Rank	Applicant	Project	Last Contact	Scope	RFP	Selection	Contract
Italik	Аррисан	College Village/Greater	Comact	осоре	IXI I	Selection	Contract
		Dunlap Neighborhood					
		Sustainable Community -	X	X	Х	Х	Х
11	Yucaipa	Complete Streets; TOD					
		Multi Jurio distinuo I Degional					
	Las Vienenas Maliku	Multi-Jurisdictional Regional					
	Las Virgenes-Malibu Council of	Bicycle Master Plan - Active transportation; Public	X	X	X	Х	X
12	Governments	health; Adaptive re-use					
12	Governments	nearin, Adaptive re-use					
		Bicycle & Pedestrian Master	x	x	x	x	
13	Eastvale	Plan - Active Transportation					
		Downtown Central Business					
		District -Multi-modal; Active	x	x			
14	West Covina	transportation					
		General Plan/Sustainability					
		Element & Development					
		Code Assistance - General	X	X	X	X	Х
4-	Discourts	Plan Update; Sustainability					
15	Placentia	Plan Regional Bicycle Connectivity					
		- West Santa Ana Branch					
		Corridor - Active	x	x	х	x	
		transportation; multi-	^	^	^	1 ^	
16	Paramount/Bellflower	jurisdiction					
	r dramound bonnower	Implementation Plan for Multi-					
		Purpose Trails - Active	X	X	х	x	X
17	Costa Mesa	Transportation					
	Phase 2 (Available fu						
		East Wilshire Avenue Bicycle					
		Boulevard - Active	x	x	X		
		transportation; Livability;	^	^	^		
18	Fullerton	Demonstration project					
40	Beaumont	Climate Action Plan - GHG reduction	X	X	x	х	
19	DEAUIIIOIIL	Sustainability Master Plan					
		Update - Leverages larger					
		effort; commitment to	X				
20	Palm Springs	implement					
	-1 -3-						
		Rathbun Corridor					
		Sustainability Plan - Multi-	X	X	X		
		modal; Economic					
21	Big Bear Lake	development; Open space					
	M	Land Use, Transportation,					
	Western Riverside	and Water Quality Planning	X	X	X		
00	Council of	Framework - Integrated					
22	Governments	planning, Sustainability Bicycle Master Plan Update -					
22	Anaheim	Active transportation	X	X	X	x	x
23		Active transportation				1	

			Working /				
			Last				
Rank	Applicant	Project	Contact	Scope	RFP	Selection	Contract
24	Ontario	Ontario Airport Metro Center - Multi-modal; Visualization; Integrated planning	x				
25	Coachella Valley Association of Governments	CV Link Health Impact Assessment - Active transportation; Public health; Multi-jurisdiction	x	х	x	х	
26	San Bernardino Associated Governments	San Bernardino Countywide Complete Streets Strategy - Multi-modal; Livability; Multi-jurisdiction	х	x	x		
	Chino Hills	Climate Action Plan and Implementation Strategy - GHG reduction; Implementation; Sustainability	х	х	x	х	
28	Coachella	La Plaza East Urban Development Plan - Mixed- use, TOD, Infill	х	х	x		
29	South Bay Bicycle Coalition/Hermosa, Manhattan, Redondo	Bicycle Mini-Corral Plan - Active transportation; implementable; good value	х	х	x		
30	Hawthorne	Crenshaw Station Area Active Transportation Plan and Overlay Zone - Multi-modal; Active transportation; GHG reduction	x	x	x		
31	Chino	Bicycle & Pedestrian Master Plan - Multi-modal; Active transportation	х	х	x	х	
32	Stanton	Green Planning Academy - Innovative; Sustainability; Education & outreach	x	x	x		
33	Hermosa Beach	Carbon Neutral Plan - GHG reduction; Sustainability	x	x	x		
34	Palm Springs	Urban Forestry Initiative - Sustainability; Unique; Resource protection	х	х	x		
35	Orange County	"From Orange to Green" - County of Orange Zoning Code Update - Sustainability; implementation	x	х	x		
36	Calimesa	Wildwood and Calimesa Creek Trail Master Plan Study - Active transportation; Resource protection	x	x	x		

			Working /				
			Last				
Rank	Applicant	Project	Contact	Scope	RFP	Selection	Contract
37	Western Riverside Council of Governments	Climate Action Plan Implementation - GHG Reduction; Multi- jurisdiction; implementation	x	x	x	x	
38	Lynwood	Safe and Healthy Community Element - Public health & safety, General Plan update	x	x	x	x	
39	Palmdale	Avenue Q Feasibility Study - Mixed-use; Integrated planning	x	x	x		
40	Long Beach	Willow Springs Wetland Habitat Creation Plan - Open Space; Resource protection	x	x	X		
41	Indio	General Plan Sustainability and Mobility Elements - Sustainability; Multi-modal, General Plan update	x	x	x		
42	Glendale	Space 134 - Open space/Freeway cap; Multi- modal	х	х	x		
43	Rancho Palos Verdes/City of Los Angeles	Western Avenue Corridor Design Implementation Guidelines - Urban Infill; Mixed-use; Multi-modal	x	x	x	x	
44	Moreno Valley	Nason Street Corridor Plan - Multi-modal; Economic development	х	х	х	х	
	Phase 3 (Pending ad	ditional funds)					
45	Park 101/City of Los Angeles	Park 101 District - Open space/Freeway cap; Multi-modal	Oct-13				
46	Los Angeles/San Fernando	Northeast San Fernando Valley Sustainability & Prosperity Strategy - Multi- jurisdiction; Economic development; Sustainability	x				
	San Dimas	Downtown Specific Plan - Mixed use; Infill	Oct-13				
	Los Angeles - Department of City Planning	CEQA Streamlining: Implementing the SCS Through New Incentives - CEQA streamlining	Oct-13				
49	Pico Rivera	Kruse Road Open Space Study - Open space; Active transportation	Oct-13				

			Working /				
			Last				
Rank	Applicant	Project	Contact	Scope	RFP	Selection	Contract
	South Bay Cities	Neighborhood-Oriented					
	Council of	Development Graphics -	Oct-13				
50	Governments	public outreach					
	0 0 1	Safe Routes to School					
	San Bernardino Associated	Inventory - Active transportation; Public	Oct-13				
5 1	Governments	health					
31	Governments						
		Mixed-Use Development Standards - Mixed use ;	x				
52	Burbank	Urban infill	^				
32	Durbank	Orban mini					
		Countywide Habitat					
	San Bernardino	Preservation/Conservation	Oct-13				
	Associated	Framework - Open Space;					
53	Governments	Active Transportation					
		Healthy RC Sustainability					
		Action Plan - Public health;	X				
54	Rancho Cucamonga	implementation					
		Form-Based Street Design					
		Guidelines - Complete					
		Streets; Multi-modal;	Х				
55	Pasadena	Livability					
		0					
		Gateway District/Eco Rapid					
		Transit Station Specific Plan -	Oct-13				
EG	South Gate	Land Use Design; Mixed Use; Active Transportation					
36	South Gate	Complete Streets Master					
		Plan - Complete Streets	x				
57	Lancaster	Plan	^				
		Feasibility Study for					
		Relocation of Metrolink	Oct-13				
58	Rancho Cucamonga	Station - Transit Access					
		Soledad Canyon Road					
		Corridor Plan - Land Use	Oct-13				
59	Santa Clarita	Design; Mixed Use Plan					
	Cool Doools	Climate Action Plan - Climate	x				
60	Seal Beach	Action Plan Industrial Area Specific Plan -					
61	La Mirada	Land Use Design	Oct-13				
01	La Milaua	Downtown Hemet Specific					
		Plan - Land Use Design;	x				
62	Hemet	Mixed Use Plan	^				
	Hollywood Central	Hollywood Central Park EIR -					
	Park/City of Los	Open Space/Freeway Cap;	Oct-13				
63	Angeles	Multi-modal					
		Bicycle/Pedestrian Beltway					
		Planning Project - Active	X				
64	Desert Hot Springs	Transportation					

			Working /				
			Last				
Rank	Applicant	Project	Contact	Scope	RFP	Selection	Contract
		General Plan Update -	Oct-13				
		Sustainability - General Plan	001-13				
65	Cathedral City	Update; Sustainability Plan					
		General Plan Update -					
		Circulation Element -	x				
		General Plan Update;	^				
66	Westminster	Complete Streets					
		Climate Action Plan - Climate	Oct-13				
67	La Canada Flintridge	Action Plan	JUL-13				
		Neighborhood Electric					
		Vehicle Plan - Electric	Oct-13				
68	Huntington Beach	Vehicle					
		Green House Gas (GHG)					
		Emission Reduction	Oct-13				
		Evaluation Protocol - Climate					
69	Pasadena	Action Plan					
	San Bernardino	Countywide Bicycle Route					
	Associated	Mobile Application - Active	Oct-13				
70	Governments	Transportation General Plan Update -					
74	Dona Boint	•	Oct-13				
/ 1	Dana Point	General Plan Update RE:IMAGINE Downtown -					
		Pedals & Feet - Active					
72	Garden Grove	Transportation; Infill	X				
12	Galdell Glove	Transportation, inim					
		Housing Element and					
		Specific Plan Update -	Oct-13				
73	Barstow	Housing; Land Use Design					
73	24.0.011						
						1	
						Working	55
						Scope	44
						RFP	42
						Selection	25
						Contract	13